



## **Harnessing Opportunities and Talent: An Economic Development Strategy for Columbia County, Georgia**

**October 14, 2016**

Prepared for the:





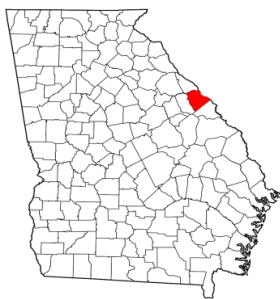
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## EXECUTIVE SUMMARY

In May 2016, the Development Authority of Columbia County (DACC) retained Garner Economics, LLC to develop an economic development strategy. The focus of this engagement was to help Columbia County understand how it can leverage its strengths and mitigate challenges to create economic opportunities for its citizens. The resulting plan, ***Harnessing Opportunities and Talent: An Economic Development Strategy for Columbia County***, provides a roadmap that details the product improvement, marketing, and organizational changes the DACC and the County must make to ensure that Columbia County strengthens its competitive position and is able to attract and retain the types of businesses that will create jobs and opportunities for its population.

Columbia County, Georgia



Specifically, the process to build the economic enhancement strategic plan included the following:

- A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;
- An **ASSETS AND CHALLENGES ASSESSMENT** (A&C) of Columbia County from the perspective of a site-location consultant that facilitates investment decisions; and
- A set of implementable recommendations that the leadership in the County can take to make Columbia County a more desirable business location for the identified business targets and to market the County as such.

Figure 1 illustrates the process to build the strategy.

FIGURE 1: PROJECT PHASES

Phase I: Discovery	<p>Evaluate Columbia County's competitive position from an economic development perspective:</p> <ul style="list-style-type: none"> <li>• Community Engagement Feedback</li> <li>• Community Assets and Challenges Assessment</li> <li>• Demographic, Economic, and Labor Analysis</li> </ul> <p>Compare the County to the United States; the state of Georgia; and the benchmarked counties of Forsyth County, Georgia, and Williamson County, Tennessee.</p> <p>Publish the <b>COMPETITIVE REALITIES REPORT</b> (a summary of Phase I).</p>
Phases II and III: Strategy and Implementation	<p>Position Columbia County to achieve success through an actionable strategy, including short- and long-term tactics (1–5 years) addressing:</p> <ul style="list-style-type: none"> <li>• Business retention and growth</li> <li>• Product improvement initiatives for the County</li> <li>• Entrepreneurship</li> <li>• Business recruitment and marketing</li> <li>• Workforce needs</li> </ul> <p>Present the final report.</p>

### *Analysis and Assessments*

The strategic economic development plan is a compilation of local and regional facts and data points. Combined with the A&C (and the background analysis and research that validates it), this process informed the work to identify target business sectors for the County. These “building blocks” are also the basis upon which the strategic recommendations were built. The assessments and their key findings are presented in greater detail in Chapter 1.

### *Target Business Sectors*

The analysis and assessment carried out in Phase I revealed that Columbia County has many assets upon which to build. The Target Business Sector analysis presented in Chapter 2 provides the rationale for five target business sectors for the County that will diversify its economic base, as well as build on current areas of strengths. These targets are best fits for the County based on the current economic and business climate conditions and are recommended given the County’s attributes and assets.

The five target business sectors identified for the County are:

- **Cybersecurity & Government Contracting**
- **High-Value Professional Services**
- **Innovative Manufacturing**
- **Entrepreneurial & Retail Development**
- **Health Services**

### *Recommendations*

In conducting this analysis, the Garner Economics team found that Columbia County has the opportunity to set itself apart as a competitive place for several types of business sectors beyond its traditional strengths. (This is most evident in the Cybersecurity and Government Contracting target related to Fort Gordon). To capitalize on this, however, the County must be proactive in leveraging the area’s assets and workforce. Chapter 3 of this strategy offers a set of implementable recommendations that will help Columbia County better focus its economic development service delivery to support the Cyber Center of Excellence, attract the types of high-quality companies that make up the identified business sector targets, and be better positioned for the next wave of economic growth.

The recommendations reflect items that Columbia County or the DACC should undertake to mitigate negative perceptions of the County by site-location advisors or companies looking to invest in the County, as well as tactics the DACC can use to effectively market the County to the recommended business targets.

The strategic recommendations are broken into three categories and are noted in Figure 2:

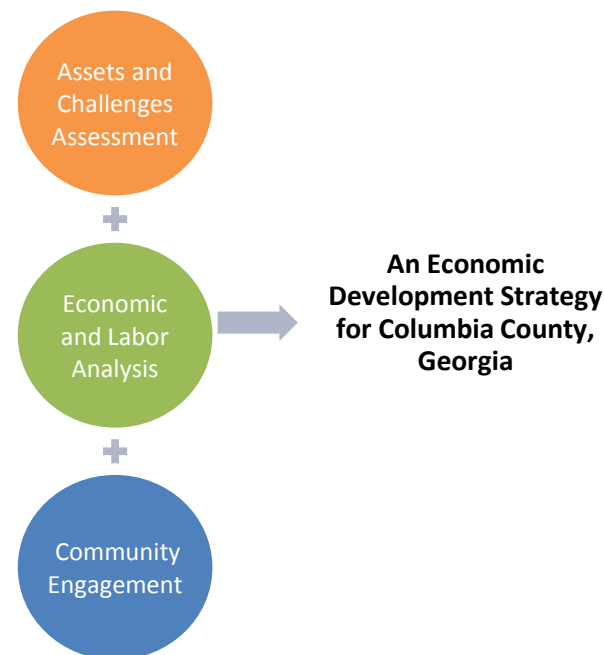
1. Policy changes and investments that should be made to strengthen the County’s product;
2. Improved economic development service delivery; and,
3. Tactics to better market the region.

**FIGURE 2: RECOMMENDATIONS**

Enhance the Product	Tell the Story
<ol style="list-style-type: none"> <li>1. Create a culture, programs, and support infrastructure for entrepreneurship in Columbia County</li> <li>2. Create a plan to improve gateways into the County—including new signage, landscaping, and beautification initiatives</li> <li>3. Develop a real estate portfolio of additional sites for manufacturing and office development</li> <li>4. Develop an office/R&amp;D park near one of Fort Gordon's entrances and joint venture with the private sector to create a Sensitive Compartmented Information Facility speculative building (SCIF) space</li> <li>5. Create a long term TIF and TAD financing strategy to help fund public infrastructure and private development related to the targeted business sectors</li> </ol>	<ol style="list-style-type: none"> <li>1. Develop a Columbia County unified brand</li> <li>2. Enhance the DACC's marketing tools and tactics in its external outreach efforts               <ol style="list-style-type: none"> <li>A. Conduct in-market missions to Atlanta, New York, Chicago, and Dallas with site-selection consultants</li> <li>B. Execute a process for lead generation and business target profiling with the targeted companies</li> <li>C. "This Just In" email campaign</li> <li>D. Create a Digital Ambassadors Program</li> <li>E. Update digital and social media platforms</li> </ol> </li> </ol>
Execute Effectively	
<ol style="list-style-type: none"> <li>1. Develop a realistic and sustainable incentive policy for the County</li> <li>2. Create a Project Opportunity Fund (deal closing fund)</li> <li>3. Conduct a capital campaign feasibility analysis for the DACC</li> <li>4. Reorganize the DACC to effectively seize on current and future economic opportunities and create an advisory board of directors</li> </ol>	

The recommendations proposed in *Harnessing Opportunities and Talent: An Economic Development Strategy for Columbia County* call on DACC to act as a catalyst to lead initiatives to improve the area's economic development service delivery and serve as a facilitator, advocate, or participant in other initiatives to improve the overall business climate of the region. By taking steps to balance its economy, leverage existing and emerging assets, and better highlight its unique advantages, Columbia County can shape its economic future and ensure that there are sufficient economic opportunities for its residents.

**FIGURE 3: ELEMENTS THAT INFORM THE RECOMMENDATIONS**



## CHAPTER 1: A SUMMARY OF THE COMPETITIVE REALITIES REPORT

This chapter summarizes the team’s findings in Phase I of the assignment. A more detailed discussion of the information was presented in the **COMPETITIVE REALITIES REPORT** delivered to the Development Authority of Columbia County in August 2016. The **COMPETITIVE REALITIES REPORT** provides an evaluation of where Columbia County stands as a place for business from both an objective and subjective basis. To build the report, the team conducted on-site visits, collected data, and solicited feedback from the County’s stakeholders from a site-selection perspective. The team used the same criteria and measures that potential companies looking to invest or expand in Columbia County would employ.

Additionally, the County’s economic position was compared against two peers (chosen by the DACC)—Forsyth County, Georgia, and Williamson County, Tennessee—the state of Georgia, and the United States. Three primary vehicles were used to benchmark the County: an Asset and Challenges Assessment; a Labor, Demographics, and Economic Analysis; and research comprised of a series of focus groups and an electronic survey.

The work in Phase 1 informed the business sector targeting and recommendations provided in Chapters 2 and 3 and provides the DACC a thorough understanding of where the County stands. This information identifies the County’s strengths so that the DACC can identify gaps in the County’s product, take steps to mitigate those gaps, strengthen the business climate, and market Columbia County more effectively.

### *What Stakeholders Think*

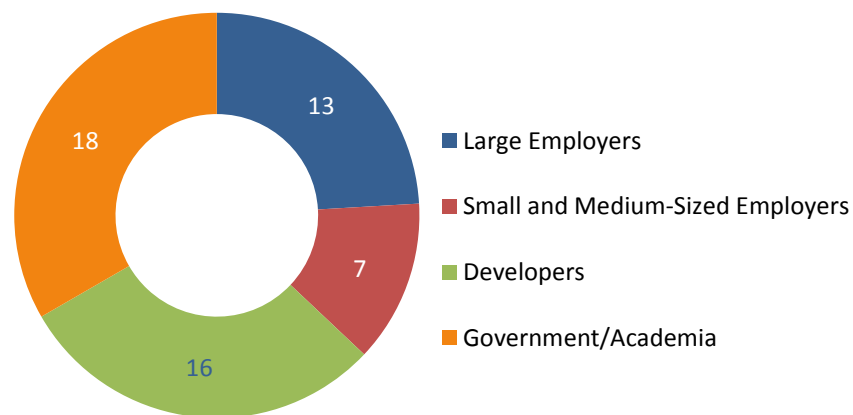
Community input is a vital part of the strategic planning process. In addition to providing a context around accumulated data, feedback from stakeholders in the community provides a way to validate conclusions. Such “on the ground” input often raises nuances or ancillary issues that

are critical to understanding the dynamics of the community. Often, such insights may not be discernible through desktop research.

As a result, as a complement to the assessment of the regulatory structure of Columbia County and its assets, Garner Economics conducted focus groups with key community stakeholders and conducted an online survey. Through these two vehicles, a variety of stakeholders shared thoughts on the area’s attractiveness to companies, the types of companies that would be a good fit for the region, and areas where the DACC could act to improve economic development in the area.

Fifty-three people participated in four focus groups that were organized into the categories noted in Figure 4. The electronic survey was built based on feedback garnered from the focus groups. It was distributed by the DACC and other groups involved in economic development in the region. The survey was open July 5–15, 2016, and was completed by 270 people.

**FIGURE 4: FOCUS GROUP PARTICIPANTS**





The key themes emerging from the stakeholder engagement are summarized below. Garner Economics recognizes that the comments (and their summation) may not necessarily be statements of fact, but represent opinions or perceptions.

- **Columbia County's quality of place and talent are key assets.** Focus group participants and survey respondents frequently noted the County's educational assets (K–12), strong workforce, and quality of place as key assets. Other strengths noted are the County's family-oriented amenities, lower cost of living, and foresight to install and maintain a strong broadband and fiber network. Other frequently provided positive descriptors included public safety, proximity to other metro areas, broadband connectivity, and developments at Fort Gordon.
- **Aging infrastructure and lack of economic development tools detract from Columbia County's competitiveness.** Conversely, feedback from both groups suggests that the area's aging infrastructure, lack of incentives and local funding options, and increasing traffic inhibit economic growth and the attractiveness of the area for businesses. Specifically, feedback suggested that the County is struggling to keep up with the explosive growth, especially in regard to roads and sewer. Some also noted the lack of public transportation, sidewalks, or bike paths and access to the river or lake.

Stakeholders noted that there is disagreement among the community as to the optimal level of growth for the County and acknowledge that the area has few amenities that would attract young professionals or millennials. Both groups noted that the lack of a central gathering place and high-end retail and services are

weaknesses. Lastly, stakeholders commented that the County does not have a well-defined identity or brand.

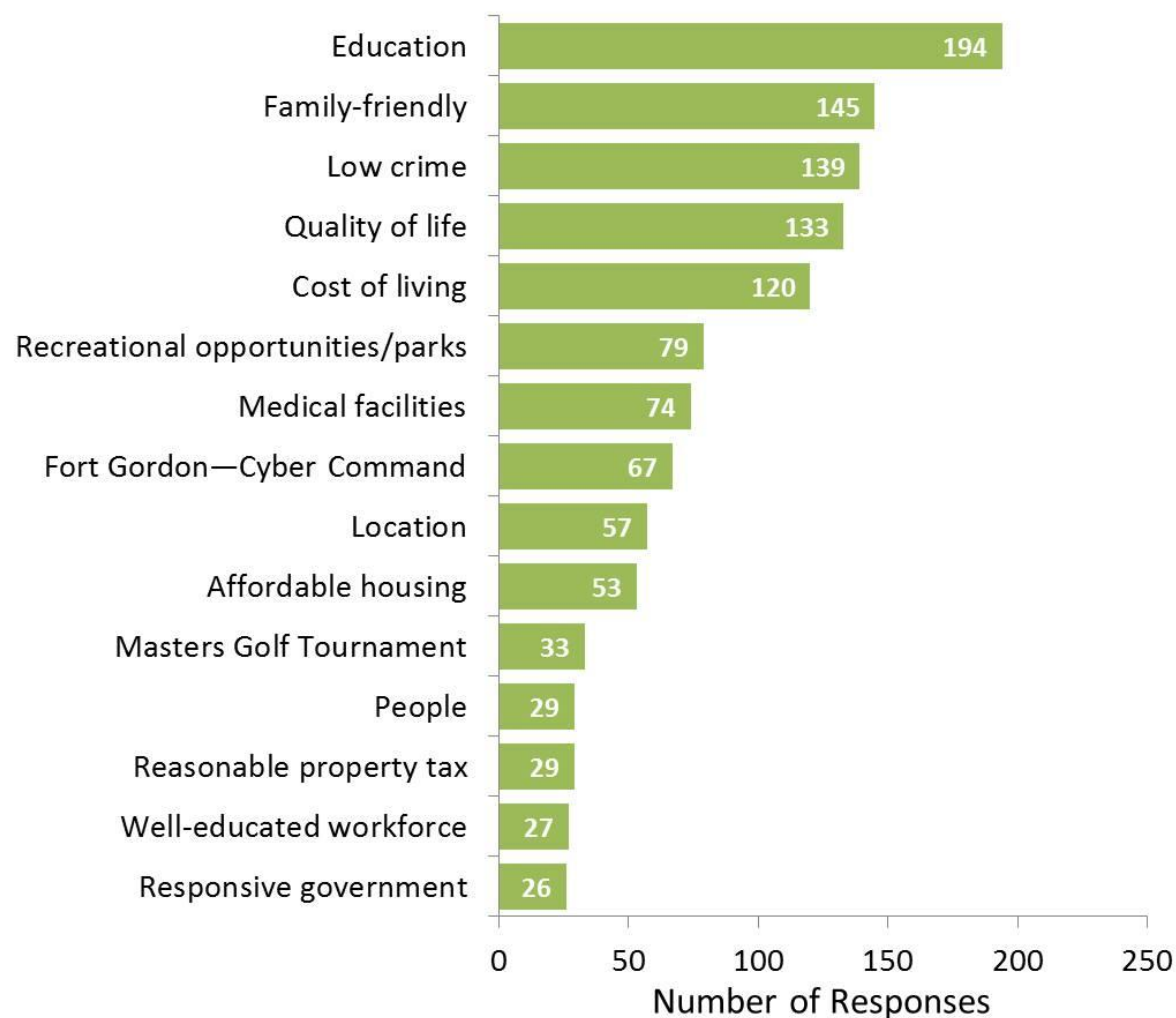
- **Columbia County's business climate is slightly above average.** When asked to rank Columbia County in terms of the policies and laws enacted by the local government that have an impact on local businesses, focus group participants and survey respondents scored the County as average. Large Employers gave the County the highest score, while Developers ranked the County the lowest.
- **Work to close the current skills gap should continue.** Stakeholders in both the focus groups and the survey noted that, despite its strong K–12 school system, Columbia County suffers from a skills gap within its current workforce, especially in the trades, health care, and computer skills. Several lauded the proactive efforts by Augusta Tech and the County high schools to fill the gaps, specifically in work being done to build skillsets to complement the Cyber Command at Fort Gordon. They also point to partnerships with the high schools and community colleges to develop curricula.

Some participants believe that there is a lack of soft-skills in entry-level workers, while others do not. Regardless, all noted the difficulty in recruiting and retaining millennials and a perceived increase in brain drain in the region.

Figures 5–9 highlight the stakeholder feedback provided on the competitive position of Columbia County. A detailed summary of the community engagement input was provided in the [COMPETITIVE REALITIES REPORT](#).

## FIGURE 5: PERCEIVED STRENGTHS

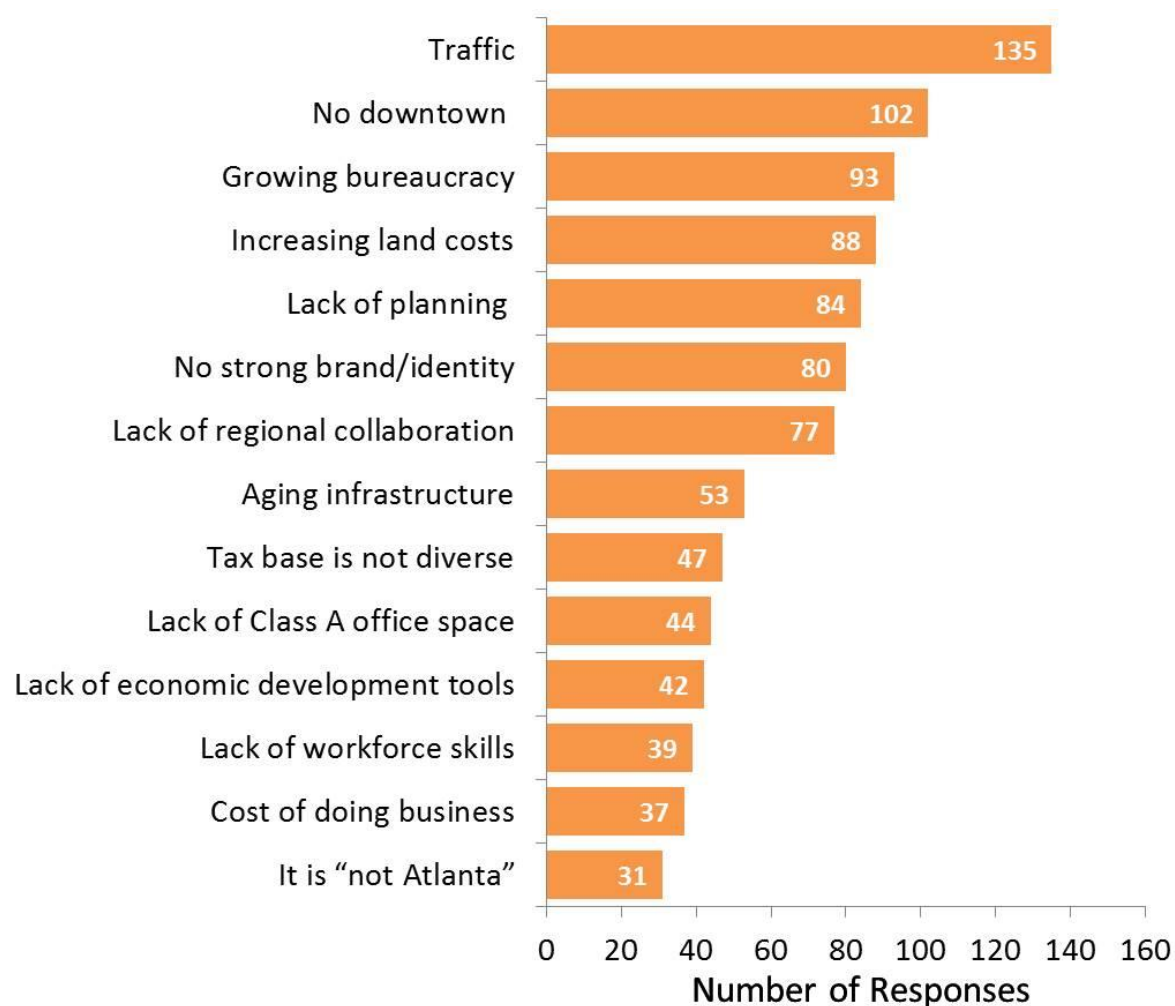
*When asked to name Columbia County's strengths, focus group participants and survey respondents responded as follows:*





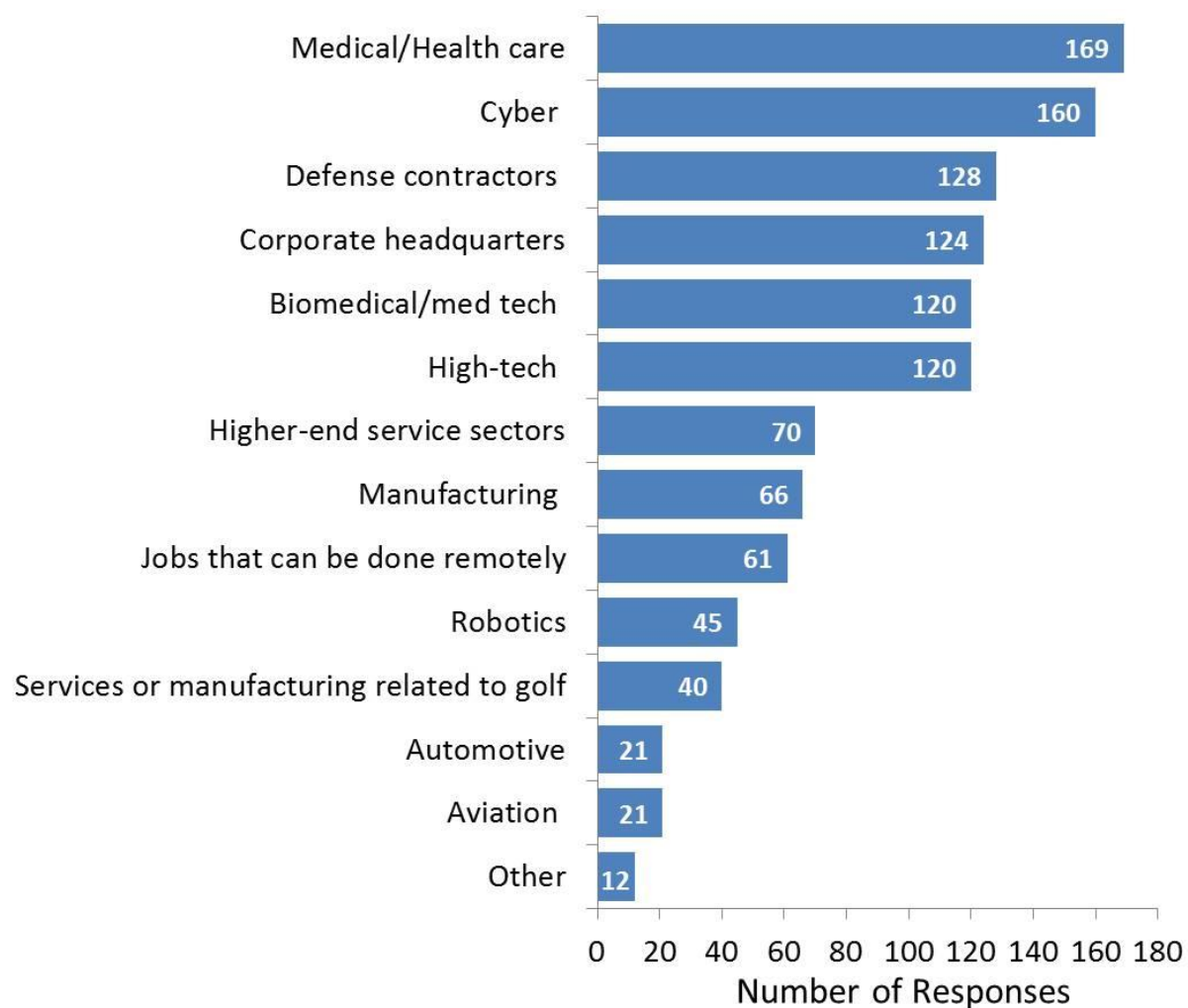
## FIGURE 6: PERCEIVED INHIBITORS

*When asked to indicate issues that inhibit Columbia County from recruiting businesses, the two groups responded as follows:*



**FIGURE 7: TARGET BUSINESS SECTORS**

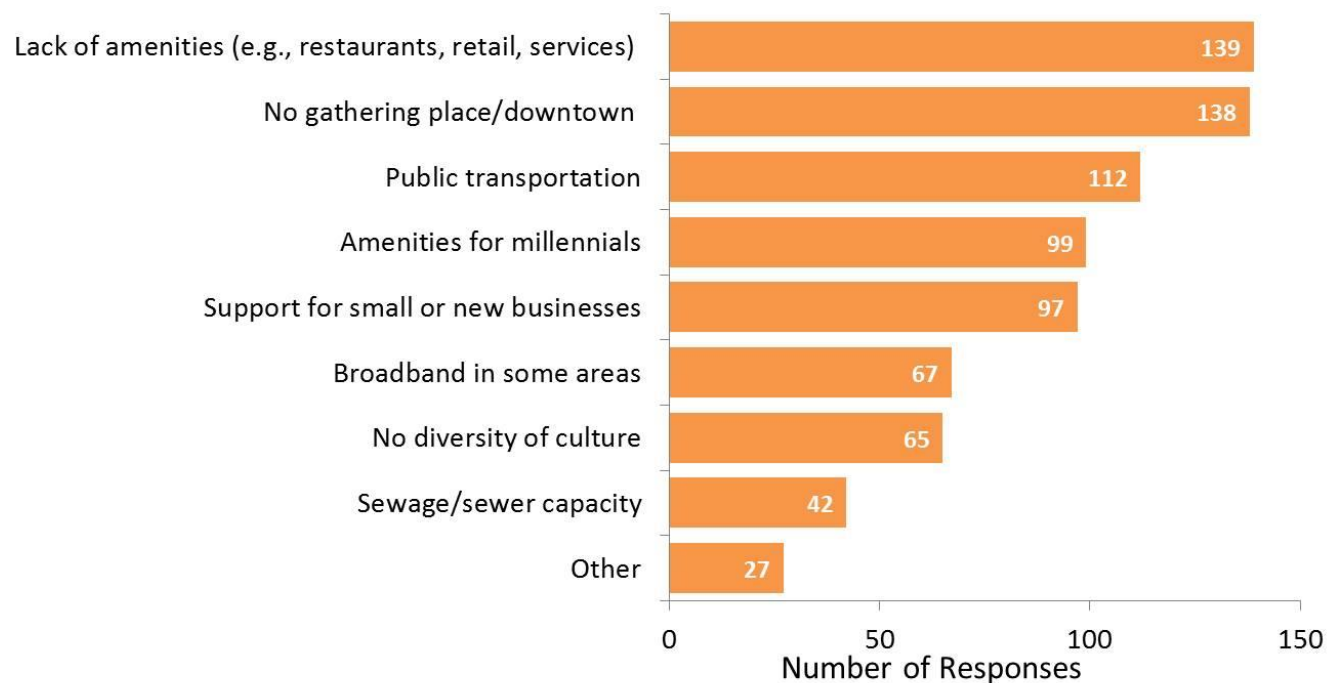
*When asked what types of business sectors would be a good fit for the area, the two groups responded as follows:*



“Other” responses provided include distribution operations, headquarters for religious organizations, restaurant/hospitality, retail, and recreational outfitters/manufacturers.

## FIGURE 8: LACKING INFRASTRUCTURE

*When asked what hard or soft infrastructure\* is weak or missing in Columbia County, the survey respondents and focus group participants ranked the items as follows:*



“Other” responses cited the need for better roadways/traffic planning, more evenly distributed parks, more amenities (retail and dining), and more outdoor recreational options. Less frequently noted responses include: sidewalks, public transportation, passenger flights, tree ordinances, “innovative and eco-friendly” riverfront amenities, and more performance spaces.

\*Hard infrastructure is defined as the physical networks such as roadways, sewer, broadband internet, airports and/or ports; soft infrastructure refers to institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks.

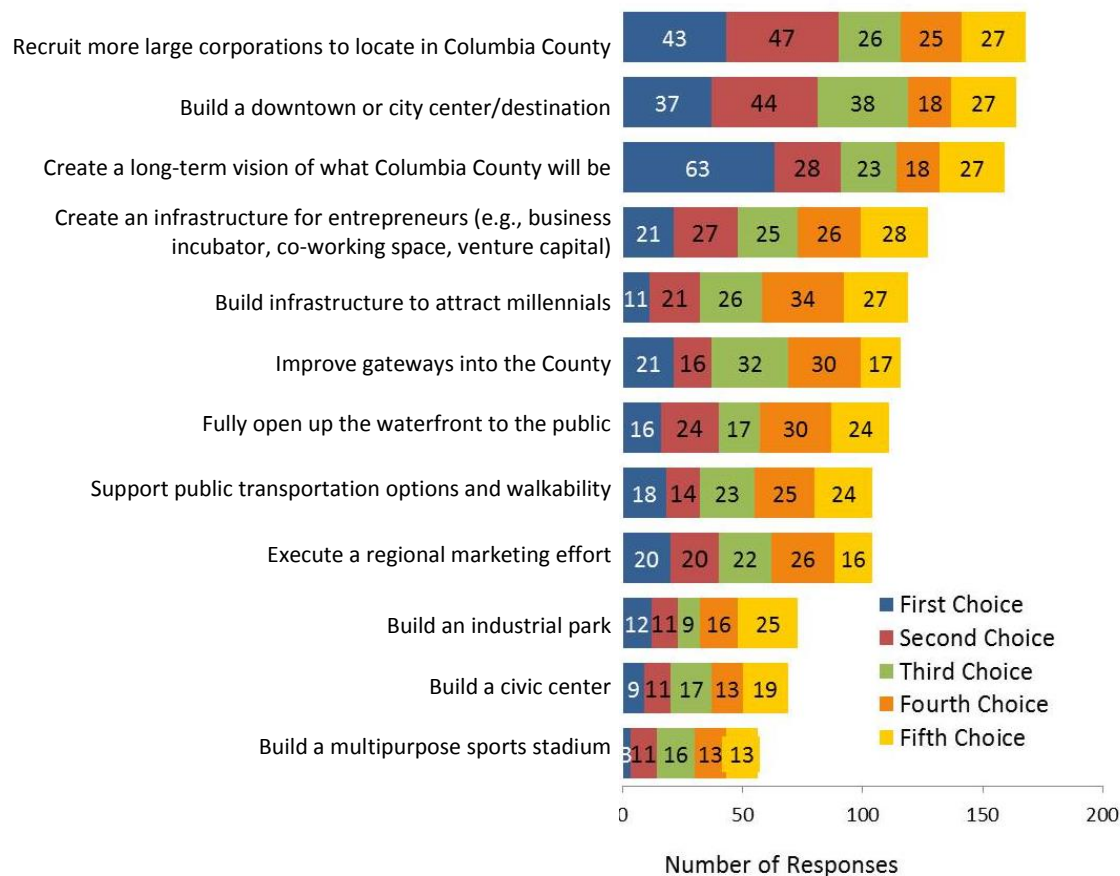
**FIGURE 9: PRIORITIES TO STRENGTHEN COLUMBIA COUNTY'S COMPETITIVE POSITION AS A PLACE FOR BUSINESS AND TALENT**

*When asked to indicate the top items they would like to see the County leadership take on to strengthen its ability to attract and retain quality companies and talent to Columbia County in the next 5–10 years—without worrying about money or politics—the two groups responded as follows:*

**Responses given by focus groups:**

- Build a real destination, amenities that appeal to millennials
- Improve or enhance the vision of what Columbia County can be
- Public transit and pedestrian paths
- Create a regional marketing plan
- Fully open the waterfront to the public
- Create an incubator/co-working space
- Build a multipurpose stadium
- Build more infrastructure along the lake
- Improve gateways into the County
- Create an industrial park with 5,000 acres
- Build a large civic center
- Recruit large corporations

**Most frequently noted by survey respondents:**



### *Assets and Challenges Assessment*

Garner Economics began the project to help develop an economic development strategy for Columbia County by assessing where the County stands. The team used a rigorous set of techniques based on fully sourced and reliable datasets to completely understand the County's current economic state. This assessment was undertaken from the perspective of businesses looking at Columbia County as a possible location for operations and was grounded in decades of economic development, site-location analysis, and industry cluster targeting experience.

The main component of the first phase was the **ASSETS AND CHALLENGES ASSESSMENT**, which is a compilation of local facts and data points with quantitative analysis and some subjective opinions. These are the same variables typically employed when undertaking a locational assessment for a corporate client.

Garner Economics analyzed 57 community factors as part of the assessment. Columbia County was compared to Forsyth County, Georgia; Williamson County, Tennessee; the state of Georgia; and the United States. The two peer regions, Forsyth County and Williamson County, were chosen because they are similar to Columbia County in three key ways:

1. All are primarily bedroom communities adjacent to a larger urban center,
2. All have been growing rapidly in recent years, and
3. All are relatively affluent communities.

Of the 57 variables against which Columbia County was assessed, 17 are considered an Asset and 17 a Challenge (23 rated as Neutral). With 17 challenge rankings, Columbia County has too many negative rankings and multiple variables noted as neutral (23) based on the ratio of an economically healthy, dynamic county.

To enable a summary overview of the report's main findings for readers, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. The complete **ASSETS AND CHALLENGES ASSESSMENT** was included in the **COMPETITIVE REALITIES REPORT**. The tables on the following pages summarize the assessment.

### **REPORT DASHBOARD**



Indicates Columbia County is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.






Indicates Columbia County is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.






Indicates Columbia County is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

**FIGURE 10: COLUMBIA COUNTY'S ASSETS AND CHALLENGES**

Detailed data and rationale for the ratings can be found in the [COMPETITIVE REALITIES REPORT](#).

	 <b>Assets</b>	 <b>Challenges</b>	 <b>Neutral</b>
<b>Access to Markets</b>	<ul style="list-style-type: none"> <li>Centrally located for major regional market</li> <li>Centrally located for national market</li> <li>Interstate highway(s)</li> </ul>	<ul style="list-style-type: none"> <li>Lack of port facilities (inland and/or water)</li> </ul>	<ul style="list-style-type: none"> <li>Ability to serve international markets</li> <li>Rail service</li> <li>Within one hour of commercial air passenger service</li> <li>General aviation airport capable of handling corporate aircraft</li> <li>Broadband availability and speeds</li> </ul>
<b>Labor</b>	<ul style="list-style-type: none"> <li>Cost of labor</li> <li>Availability of post-secondary vocational training</li> <li>Within ½ hour of four-year university/college</li> </ul>	<ul style="list-style-type: none"> <li>Higher level of unionization for the MSA compared to the benchmarks</li> <li>Lack of engineering program (locally)</li> </ul>	<ul style="list-style-type: none"> <li>Availability of skilled industrial workers</li> <li>Availability of skilled clerical workers</li> <li>Availability of technicians and scientists</li> <li>Availability of managerial personnel</li> </ul>
<b>Access to Resources</b>	No relative Strengths (see Challenges and Neutral ratings)	<ul style="list-style-type: none"> <li>Lack of agricultural products for food processing</li> </ul>	<ul style="list-style-type: none"> <li>Availability of manufacturing processes</li> <li>Availability of business and professional services</li> </ul>
<b>Economic Development Program</b>	<ul style="list-style-type: none"> <li>Level of leadership support of economic development program</li> </ul>	<ul style="list-style-type: none"> <li>Lack of adequate level of professional staff</li> <li>Lack of local economic development organization has a strategic plan</li> <li>Low level of funding for local economic development program</li> </ul>	<ul style="list-style-type: none"> <li>Involvement of both public and private sectors</li> <li>Level of cooperation between various organizations involved in economic development activity</li> <li>Level of awareness of community regarding economic development</li> </ul>
<b>Access to Space</b>	No relative Strengths (see Challenges)	<ul style="list-style-type: none"> <li>Lack of fully served and attractive industrial sites and space</li> <li>Lack of fully served and attractive office sites and space</li> <li>Lack of suitable retail space</li> </ul>	No relative Neutral ratings (see Challenges)

	 <b>Assets</b>	 <b>Challenges</b>	 <b>Neutral</b>
<b>Access to Funding</b>	No relative Strengths (see Challenges and Neutral ratings)	<ul style="list-style-type: none"> <li>Lack of venture capital from local sources for business startups or early-stage funding</li> </ul>	<ul style="list-style-type: none"> <li>Availability of tax exempt financing for new/expanding industrial facilities</li> <li>Availability of low-interest loans for small business</li> </ul>
<b>Government Impact on Business</b>	<ul style="list-style-type: none"> <li>Availability/capacity of water and wastewater treatment</li> <li>Availability of labor training incentives</li> <li>Quality of local elementary and secondary education</li> <li>Quality of post-secondary education</li> </ul>	<ul style="list-style-type: none"> <li>Weak condition and maintenance of local streets</li> <li>Lack of local incentives</li> </ul>	<ul style="list-style-type: none"> <li>Availability of adequate water and sewer lines to industrial sites</li> <li>Business permitting procedures</li> <li>Local property taxes</li> </ul>
<b>Quality of Place</b>	<ul style="list-style-type: none"> <li>Availability of executive-level housing</li> <li>Availability of moderate-cost housing</li> <li>Cost-of-living index</li> <li>Level of crime</li> <li>Low climate and natural disaster risk</li> </ul>	<ul style="list-style-type: none"> <li>Lack of major shopping facilities</li> <li>Lack of adequate medical facilities</li> <li>Lack of AAA-rated, four-diamond hotels, motels, and resorts</li> <li>Lack of diversity of local restaurants</li> <li>Poor appearance of the Central Business District</li> </ul>	<ul style="list-style-type: none"> <li>Availability of apartments</li> <li>Level of cultural activity</li> <li>Availability of recreational opportunities</li> <li>General appearance of the community</li> </ul>








### Demographic, Labor, Economic Trends, and Retail Analysis

As a complement to the asset benchmarking work above, the team examined Columbia's economic position relative to the same benchmark counties, the state of Georgia, and the national average.

This analysis relies heavily on raw objective data collected by governmental or impartial third-party agencies. Garner Economics used data that can be verified and, for which, comparisons with other cities or









areas can be made at the level of detail preferred by most site-selection professionals. In all cases, the original and most current available data as of June 2016 are used.

The scorecards presented below were included in the **COMPETITIVE REALITIES REPORT**.

Demographic & Labor Dynamics		
<b>Population Growth</b>		From 2005 to 2015, the total population of Columbia County increased by 40,983 residents, or 39.8 percent. This is well above the national and state growth rates, slightly above Williamson, but below Forsyth.
<b>New Residents</b>		Over the 2011 to 2013 period, Columbia County attracted 34.6 percent of its new residents from a <i>Different State</i> , a higher share than all other geographies. Columbia also drew a higher share of new residents from a <i>Different County in Same State</i> than all other areas besides Forsyth.
<b>Diversity</b>		Columbia County has a more racially/ethnically diverse population base compared with both benchmark counties, but a far less diverse population than either Georgia or the U.S. total.
<b>Age</b>		Columbia County has the highest proportion of residents in two age groups, <i>Under 5</i> and <i>60–64</i> , as well as higher shares than the benchmarks for the <i>20–24</i> and <i>25–34</i> age groups. The County's median age of 36.4 is well below both benchmarks and the national median of 37.7.
<b>Crime</b>		Columbia County has a low violent crime rate relative to the nation and state, and comparable to the benchmarks. Columbia has a higher property crime rate than the benchmarks, though still below national and state averages.



Demographic & Labor Dynamics <i>(continued)</i>		
<b>Educational Attainment</b>		Columbia County has lower shares of residents ages 25+ with a <i>Bachelor's Degree</i> or <i>Graduate or Professional Degree</i> than both benchmarks, but higher rates than state or national averages. Columbia County has the highest share among all geographies of residents ages 25+ with <i>Some College or Associate Degree</i> , though.
<b>Secondary School Performance</b>		Public high schools in Columbia County rank below the two benchmark counties in terms of SAT and ACT scores and high school graduation rates, but above state and national averages.
<b>STEM Degrees</b>		Columbia County has the highest share of college graduates among all geographies who have degrees in Science, Technology, Engineering, and Mathematics (STEM) fields. The County's share of residents with STEM degrees is well above national and state averages and comparable to both benchmarks.
<b>New Resident Educational Attainment</b>		Among new residents ages 25 and over, Columbia County attracts lower relative proportions of new residents with at least a <i>Bachelor's Degree</i> than the benchmark counties, particularly Williamson County. Columbia does attract a higher share of college graduates than Georgia or the United States, however.
<b>Median Earnings</b>		Median earnings for Columbia County residents with a <i>Bachelor's Degree or Higher</i> are well below the benchmark communities, especially Forsyth County, but higher than state or national medians.
<b>Worker Flows</b>		More than three-quarters (75.5 percent) of Columbia County's resident workforce commutes to jobs outside the County. The County has 20,000 more out-commuters than in-commuters.
		From 2005 to 2014, there was barely any increase (2.4 percent) in the number of Columbia County residents who also work in the County. During the same period, the number of County residents who out-commute increased by 27.9 percent.
<b>Unionization</b>		The Augusta-Richmond County MSA has a rate of unionization among private employers (8.4 percent) that is above national and state averages and far above the averages in Williamson (Nashville MSA) (2.1 percent) and Forsyth (Atlanta MSA) (3.3 percent).
<b>Retail Leakage</b>		The overall estimated retail leakage rate for Columbia County is 26 percent; the County captures nearly three-quarters of its potential retail spending. There is significant leakage in several categories, though—particularly <i>Electronics and Appliance Stores, Clothing and Clothing Accessories Stores, and General Merchandise Stores</i> .

Economic Dynamics		
<b>Weekly Wage</b>		In 2014, the estimated average weekly wage in Columbia County was \$679, which was more than 30 percent below the national average of \$988 and far below state, Augusta MSA, and benchmark averages. The County's average wage increased by 26.4 percent from 2004 to 2014, which is slightly above Forsyth's wage growth of 23.6 percent, but far behind Williamson's rate of 48.8 percent.
<b>Per Capita Income</b>		According to the US Census Bureau, the average per capita income in Columbia County of \$28,306 is nearly equal to the national average, but well below the averages in Williamson (\$44,973) and Forsyth (\$35,986).
<b>Self-Employment</b>		As of 2013, 8.2 percent of workers in Columbia County classified themselves as <i>Self-Employed</i> ; this proportion is below the national average of 9.6 percent and far below the averages in Williamson (14.2 percent) and Forsyth (11.3 percent).
		Median earnings among those workers classified as <i>Self-Employed in Own Incorporated Business</i> were \$52,739 in Columbia County; this is above the median levels for the nation, Georgia, and Forsyth, but far below Williamson's level of \$74,063. Median earnings for those classified as <i>Self-Employed in Own Not Incorporated Business</i> in Columbia County were \$18,487, which was below all other geographies.
<b>Labor Force Participation</b>		At 56.3 percent, Columbia County has the lowest share of residents aged 16+ employed in the labor force among all geographies. By comparison, Williamson's share is 66.3 percent and Forsyth's is 64.6 percent.
		Columbia County has a far lower share (39.2 percent) of married-couple families with both husband and wife in the labor force compared with Williamson (46.8 percent) or Forsyth (46.1 percent). Columbia's share is above state and US totals, though. Columbia has a higher share of unmarried individuals in the labor force than both benchmarks, but below state and national averages.
<b>Household Income</b>		Columbia County has the highest share of households among all areas in two middle range income categories: \$50,000–74,999 and \$75,000–99,999. Columbia has higher concentrations of low-income households than the benchmarks, but lower concentrations than state or national averages. Conversely, Columbia has lower shares of households earning more than \$100,000 than the benchmarks, but higher shares than Georgia or the United States.
<b>Poverty</b>		The poverty rate of 11.1 percent in Columbia County is below that national average of 15.5 percent and the state average of 18.3 percent, but well above the rates in Williamson (5.5 percent) and Forsyth (6.1 percent).

## CHAPTER 2: OPTIMAL TARGETS FOR COLUMBIA COUNTY



The optimal business sectors selection is based on the specific characteristics of the economy of Columbia County. These recommended targets are designed to assist local economic development groups with prioritizing resources by focusing on industry sectors for which the County and region hold competitive advantages and/or have significant growth potential. This approach will help policymakers prioritize the County's community and economic development strategy.

Garner Economics uses a desirability and feasibility screening matrix to determine the optimal targets. Desirability begins with considering the types of business sectors the community would like to see in the County (Figure 11). Feasibility includes what the area can actually achieve in the short- to mid-term, based on current or planned locational assets and in conducting an analytical review of the regional economy.

Using results from the previously completed **COMPETITIVE REALITIES REPORT**, **ASSETS AND CHALLENGES ASSESSMENT**, focus groups, and field visits, five business and industry groups were chosen that best match Columbia County's unique competitive advantages to the needs of particular industry sectors. The optimal targets include many economic sectors that are in the midst of significant transformations and are, therefore, most likely to have increased interest in adding, growing, or moving operational sites (Figure 12). For each target, Columbia

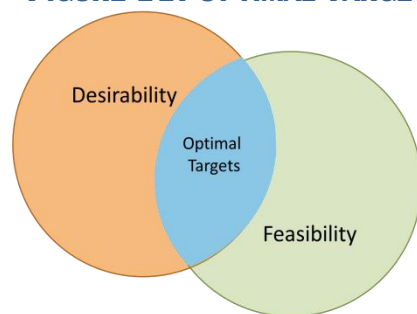
County has a competitive advantage in the marketplace. Some targets are already established in the area and are positioned for additional growth. For others, there are opportunities to leverage the region's assets in order to either attract existing businesses or to encourage entrepreneurs to start new ventures. For all targeted business sectors, the County's competitive advantages are presented, along with national trends and projections of the targets. In some cases, target sectors are actually losing jobs nationally, but the County's particular set of economic development assets puts it in position to capture demand.

The target information is presented in a practical and workable format, avoiding complex analysis and extensive projections of future outcomes. Instead, the justifications for the targets should be clearly apparent and make sense to practitioners and community leaders. Under each major target, a list of individual subsectors is provided with accompanying NAICS classifications. A full description for each subsector target can be found in Table 16 (pages 41–47). Detailed subsector targets help to bridge the gap from broad economic concepts to a workable means for identifying specific prospective industries and firms.

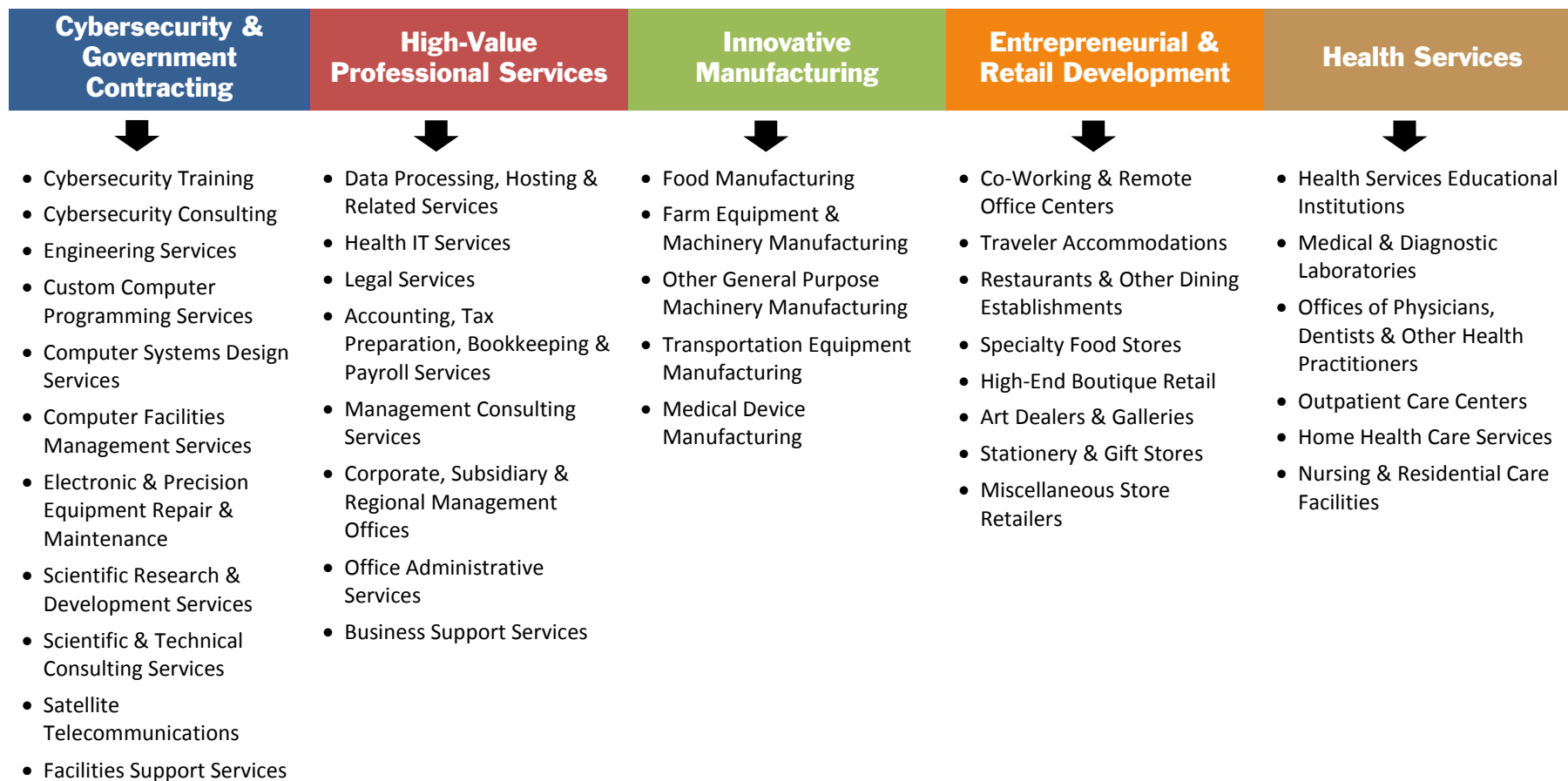
For each target, a bulleted list of rationales is presented and identified as appealing to the needs of **prospects (P)** or the **community (C)**. This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

One of the targets is centered on the *Health Services* sector. The proposed development of a full-service hospital in Columbia County would immediately elevate this sector to an even stronger role in the County's economy.

**FIGURE 11: OPTIMAL TARGET**



**FIGURE 12: OPTIMAL TARGETS FOR COLUMBIA COUNTY**



## TARGET 1: CYBERSECURITY & GOVERNMENT CONTRACTING



Fort Gordon has long been a key strategic post for the U.S. Army. As the home of the Department of Defense's Cyber Center of Excellence (COE), more than 12,000 military personnel receive cybersecurity training at Fort Gordon each year.

Two recent Department of Defense (DOD) decisions are driving significant growth at Fort Gordon: 1) the National Security Agency's Georgia Cryptologic Center's new facility opened in 2012 and is undergoing expansions that will bring its total employment to 7,000 by 2020; and 2) the U.S. Cyber Command is relocating its headquarters to Fort Gordon, which will result in the transfer of 4,700 positions into the area from the Washington, DC, area. Another significant project at Fort Gordon is the development of a new main gate (Gate 6), which will be located on the Columbia County side of the post. There is an active plan to connect this gate to I-20 by building a new, four-lane arterial road that runs to the west of Grovetown.

These major investments at Fort Gordon will create multiple opportunities for private sector business development in Columbia County. Most immediately, contractors that provide cybersecurity training and consulting services will have a need for Sensitive Compartmented Information Facility (SCIF) space. There is presently no SCIF space located in the Augusta region (off post), so this will need to be added. Given Columbia County's proximity to Gate 6 and ample availability of land for development, it is an ideal site for this type of development.

In the longer term, the regional effort to establish a "Cyber District" around Fort Gordon may generate additional opportunities. The new Cyber Institute at Augusta University will be a valuable asset in this effort, as it will offer a master's program in Cyber Ops. A Cyber District could also leverage the expertise in nuclear engineering and energy technology from Plant Vogtle and the Savannah River Site. Another business opportunity under this target will be for government contractors to provide facilities and maintenance services to the buildings and grounds at Fort Gordon.

### Rationales

- Presence and major expansion of U.S. Cyber Command at Fort Gordon (P)
- Development of new primary entrance to Fort Gordon on Columbia County side (P)
- Access to I-20 and major arterial roads (P)
- General aviation airport capable of handling corporate aircraft (P)
- Proximity to Augusta Regional Airport (P)
- Availability of technical personnel in the regional workforce (P)
- High concentration of workers with STEM degrees (P)
- Cyber Institute at Augusta University (P)
- Quality of local secondary & post-secondary education (P)
- Availability of broadband and dark fiber (P)
- Availability of labor training incentives (P)
- Opportunity to create new development sites along corridor highway between I-20 and Fort Gordon (C)
- Strong recent growth in *Professional, Scientific & Technical Services* sector (C)
- Low wages in related sectors compared to national averages and other competitive regions (P)
- Average target subsector national earnings of \$115,090 (C)
- Average target subsector 10-year past employment growth rate: 30.8%
- Average target subsector 10-year forecast employment growth rate: 20.5%
- An existing local pool of high-demand occupations (Table 2) (P)
- Quality of place assets: availability of all types of housing, low cost of living, low crime rate, recreational opportunities, attractive appearance (P)

**Table 1**  
**Cybersecurity & Government Contracting Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
517410	Satellite Telecommunications	\$128,898	-50.0%	26.4%	0.01
541330	Engineering Services	\$107,428	10.0%	16.8%	0.96
541512	Computer Systems Design Services	\$120,888	70.8%	32.2%	0.96
541513	Computer Facilities Management Services	\$108,234	20.6%	15.0%	0.07
541519	Other Computer Related Services	\$123,456	3.7%	0.5%	0.11
541712	R&D in the Physical, Engineering, and Life Sciences (except Biotech)	\$145,572	11.9%	12.5%	0.45
561210	Facilities Support Services	\$58,735	16.2%	25.2%	0.14
611420	Computer Training	\$93,399	-20.3%	-36.4%	0.01
811212	Computer and Office Machine Repair and Maintenance	\$65,161	-5.0%	4.3%	0.04
811213	Communication Equipment Repair and Maintenance	\$66,657	-22.1%	-14.8%	0.01
811219	Other Electronic and Precision Equipment Repair and Maintenance	\$79,845	19.7%	15.4%	0.03
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$115,090</b>	<b>30.8%</b>	<b>20.5%</b>	<b>2.80</b>

Source: EMSI, Garner Economics





**Table 2**  
***Cybersecurity & Government Contracting: Augusta MSA Existing Labor Pool of High-Demand Occupations–2016***

<b>Occupation</b>	<b>Employed in Augusta MSA</b>
First-Line Supervisors of Mechanics, Installers, and Repairers	731
Computer User Support Specialists	730
Electrical Engineers	453
Teachers and Instructors, All Other	446
Training and Development Specialists	424
Architectural and Engineering Managers	395
Computer Occupations, All Other	346
Electronics Engineers, Except Computer	285
Computer Systems Analysts	270
Telecommunications Equipment Installers and Repairers	249
Computer and Information Systems Managers	231
Network and Computer Systems Administrators	229
Electrical and Electronics Engineering Technicians	196
Computer Network Support Specialists	187
Computer Programmers	145
Computer Operators	106
Computer, Automated Teller, and Office Machine Repairers	101
Computer Network Architects	83
Electrical and Electronics Drafters	79
Electrical and Electronics Repairers, Commercial and Industrial Equipment	74
Information Security Analysts	71
Media and Communication Equipment Workers, All Other	67
Computer Hardware Engineers	35
Radio, Cellular, and Tower Equipment Installers and Repairs	23

Source: EMSI, Garner Economics

**Table 3**

***Degree Completions in Region\* in Majors Related to Cybersecurity & Government Contracting, 2014–15 Academic Year***

<b>Major</b>	<b>Certificate</b>	<b>Associate</b>	<b>Bachelor</b>	<b>Post-Grad</b>
Business, Accounting & Finance	239	105	172	44
Computer & Information Sciences	118	61	22	0
Engineering Technologies	4	42	0	0
Homeland Security & Protective Services	95	14	0	0
Mathematics & Statistics	0	0	11	0
Mechanic & Repair Technologies/Technicians	342	71	0	0
<b>Total</b>	<b>798</b>	<b>293</b>	<b>205</b>	<b>44</b>

*\*Since there are no higher education institutions located in Columbia County, this includes graduates from all accredited institutions located in Richmond County: Augusta University (formerly Georgia Regents University), Augusta Technical College, Paine College, Virginia College-Augusta, and Miller-Motte Technical College.*

*Source: National Center for Education Statistics, Garner Economics*

## TARGET 2: HIGH-VALUE PROFESSIONAL SERVICES



Columbia County is a large and rapidly growing jurisdiction that is generally considered to be the most desirable bedroom community in Georgia's second-largest metro area. Although the County has an educated workforce with a strong base of skills, most of these workers

commute out of the County each day, primarily to jobs in Augusta-Richmond County. Because of this, Columbia County has a small base of white-collar employment.

Columbia County has many assets related to this target: a good labor pool of qualified professional workers, a regional workforce training system that produces entry-level talent from several related degree programs, proximity to major employers in Augusta, the availability of broadband and fiber, and available land for development in Evans and along the I-20 corridor. The County is well positioned to attract companies that provide accounting, payroll, consulting, business support, and other related services to businesses located both inside and outside the region.

Given the availability of land and fiber around Fort Gordon, the County is also an attractive site for data centers. Should the planned hospital be developed (see Target 5), Columbia County will have additional opportunities to capture growth in the *Health Information Technology* field, especially with the new Cyber Institute at Augusta University including a program in Health Informatics.

Businesses in this target include those that offer services that can be provided remotely to customers around the country and the world. Demand for such operations is growing due to rising corporate profits and a continued movement towards outsourcing. For companies with regional offices in the southeast, the County is an appealing alternative to larger/more expensive markets such as Atlanta or Charlotte, as well as those located in Augusta. A critical component to building the County's appeal to this target group is the development of quality of place assets such as lodging, dining, shopping, and entertainment. The continued development of Evans Towne Center will be very helpful in this regard.

### Rationales

- Well positioned to serve regional and national markets (P)
- Access to interstate highways and major regional arterials (P)
- General aviation airport capable of handling corporate aircraft (P)
- Proximity to Augusta Regional Airport (P)
- Reasonable availability of managerial personnel (P)
- Reasonable availability of skilled clerical workers (P)
- Availability of post-secondary vocational training (P)
- Proximity to Augusta University and technical colleges (P)
- Quality of local secondary & post-secondary education (P)
- Strong growth rate in population of young working adults (P)
- Availability of broadband and dark fiber (P)
- Opportunity to retain resident workers within the County (C)
- Strong local growth in *Professional, Scientific & Technical Services; Finance and Insurance; and Administrative & Support Services* sectors (C)
- Low wages relative to national averages in target sectors (P)
- Growth in *Office & Administrative Support* and *Management* occupations (P)
- Average target subsector national earnings of \$91,342 (C)
- Average target subsector 10-year past employment growth rate: 20.0%
- Average target subsector 10-year forecast employment growth rate: 12.4%
- An existing local pool of high-demand occupations (Table 5) (P)
- Quality of place assets: availability of all types of housing, low cost of living, low crime rate, recreational opportunities, attractive appearance (P)

**Table 4**  
**High-Value Professional Services Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
511210	Software Publishers	\$174,191	43.4%	24.3%	0.35
518210	Data Processing, Hosting, and Related Services	\$122,778	14.0%	10.4%	0.30
5411	Legal Services	\$105,138	-4.3%	5.9%	1.12
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	\$80,136	14.2%	9.8%	1.02
541511	Custom Computer Programming Services	\$125,897	53.3%	25.6%	0.87
54161	Management Consulting Services	\$107,733	44.8%	29.4%	1.05
551114	Corporate, Subsidiary, and Regional Management Offices	\$133,982	28.7%	9.4%	2.17
561110	Office Administrative Services	\$100,957	34.5%	19.5%	0.49
5614	Business Support Services	\$46,785	15.8%	18.2%	0.91
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$91,342</b>	<b>20.0%</b>	<b>12.4%</b>	<b>8.29</b>

Source: EMSI, Garner Economics

**Table 5**  
**High-Value Professional Services: Augusta MSA Existing Labor Pool of High-Demand Occupations–2016**

<b>Occupation</b>	<b>Employed in Augusta MSA</b>
Office Clerks, General	5,529
Customer Service Representatives	4,786
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4,160
Bookkeeping, Accounting, and Auditing Clerks	2,364
Billing and Posting Clerks	812
Computer User Support Specialists	730
Management Analysts	672
Bill and Account Collectors	518
Financial Managers	463
Lawyers	448
Market Research Analysts and Marketing Specialists	363
Administrative Services Managers	333
Chief Executives	328
Software Developers, Applications	318
Human Resources Assistants, Except Payroll and Timekeeping	293
Computer and Information Systems Managers	231
Software Developers, Systems Software	229
Network and Computer Systems Administrators	229
Payroll and Timekeeping Clerks	224
Legal Secretaries	190
Computer Network Support Specialists	187
Paralegals and Legal Assistants	181
Human Resources Managers	133
Marketing Managers	112
Financial Analysts	109

*Source: EMSI, Garner Economics*

**Table 6**

***Degree Completions in Region\* in Majors Related to High-Value Professional Services, 2014–15 Academic Year***

Major	Certificate	Associate	Bachelor	Post-Grad
Business, Accounting & Finance	239	105	172	44
Communications & Journalism	0	0	71	0
Computer & Information Sciences	118	61	22	0
Engineering Technologies	4	42	0	0
Legal Professions	0	7	0	0
Liberal Arts, Humanities & Social Sciences	37	7	203	0
Mathematics & Statistics	0	0	11	0
Psychology	0	0	86	7
Public Administration & Social Service	0	0	32	10
<b>Total</b>	<b>398</b>	<b>222</b>	<b>597</b>	<b>61</b>

*\*Since there are no higher education institutions located in Columbia County, this includes graduates from all accredited institutions located in Richmond County: Augusta University (formerly Georgia Regents University), Augusta Technical College, Paine College, Virginia College-Augusta, and Miller-Motte Technical College.*

*Source: National Center for Education Statistics, Garner Economics*

### TARGET 3: INNOVATIVE MANUFACTURING



This target group includes a set of manufacturing industries that have high relative wages, an existing presence in Columbia County, have drawn recent interest from prospects, and/or are well positioned to leverage the County's assets.

This target group includes three general categories of manufacturing: 1) *Food & Beverage*, 2) *Heavy Equipment*, and 3) *Medical Devices*.

*Food & Beverage* does not currently have a local presence, but the County is attractive to these industries due to its central location, interstate and rail access, availability of land, and ample availability of water. The final factor positions the County particularly well to attract beverage manufacturers.

*Heavy Equipment* includes major existing manufacturers such as Club Car, John Deere, and GIW. These employers have all been growing, and their presence is attractive to related employers in their supply chains. These companies have also contributed to the building and maintenance of a skilled local workforce.

*Medical Devices* offers clear potential due to a strong presence of the health services sector in the region, the proximity to the Medical and Dental Colleges of Georgia, and the expected addition of a hospital to Columbia County (see Target 5).

#### Rationales

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>Centrally located for regional and national markets (P)</li> <li>Access to interstate highways and rail service (P)</li> <li>Availability of commercial passenger service and air freight facilities at Augusta Regional Airport (P)</li> <li>Availability of post-secondary vocational training (P)</li> <li>Within ½ hour of major university/college (P)</li> <li>High concentration of workers with STEM degrees (P)</li> <li>Reasonable availability of production workers and manufacturing processes (P)</li> <li>Significant number of graduates from technical programs in <i>Precision Production</i> and <i>Mechanic &amp; Repair Technologies</i> (P)</li> <li>Availability/capacity of water and wastewater treatment (P)</li> </ul> | <ul style="list-style-type: none"> <li>Availability of labor training incentives (P)</li> <li>Low cost of living relative to benchmark regions and national averages (P)</li> <li>Opportunity to build on existing local base of major manufacturers (C)</li> <li>Recent stability in local <i>Manufacturing</i> sector (P)</li> <li>Recent growth in the <i>Production and Transportation &amp; Material Moving</i> occupations (P)</li> <li>Average target subsector national earnings of \$70,492 (C)</li> <li>Expected national target subsector employment growth of 4.4% over next 10 years</li> <li>An existing local pool of high-demand occupations (Table 8) (P)</li> <li>Quality of place assets: availability of all types of housing, low cost of living, low crime rate, recreational opportunities, attractive appearance (P)</li> </ul> |
|--|---|



**Table 7**  
**Innovative Manufacturing Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
3114	Fruit & Vegetable Preserving and Specialty Food Manufacturing	\$58,679	-0.4%	-0.7%	0.17
3118	Bakeries and Tortilla Manufacturing	\$47,375	7.5%	2.8%	0.30
3119	Other Food Manufacturing	\$67,514	27.0%	10.6%	0.20
312111	Soft Drink Manufacturing	\$75,258	-5.0%	-9.5%	0.08
333111	Farm Machinery & Equipment Manufacturing	\$71,945	3.0%	9.0%	0.06
33399	All Other General Purpose Machinery Manufacturing	\$82,953	-6.0%	3.6%	0.13
336999	All Other Transportation Equipment Manufacturing	\$67,268	-9.1%	14.7%	0.01
33911	Medical Equipment and Supplies Manufacturing	\$98,362	4.2%	6.9%	0.31
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$70,492</b>	<b>7.3%</b>	<b>4.4%</b>	<b>1.17</b>

Source: EMSI, Garner Economics



**Table 8**  
***Innovative Manufacturing: Augusta MSA Existing Labor Pool of High-Demand Occupations–2016***

<b>Occupation</b>	<b>Employed in Augusta MSA</b>
Office Clerks, General	5,529
Customer Service Representatives	4,786
Laborers and Freight, Stock, and Material Movers, Hand	4,358
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	4,160
General and Operations Managers	3,388
Maintenance and Repair Workers, General	2,941
Team Assemblers	2,587
Mechanical Engineers	1,435
First-Line Supervisors of Production and Operating Workers	1,419
Business Operations Specialists, All Other	1,073
Inspectors, Testers, Sorters, Samplers, and Weighers	1,029
Shipping, Receiving, and Traffic Clerks	997
Industrial Machinery Mechanics	978
Industrial Truck and Tractor Operators	941
Executive Secretaries and Executive Administrative Assistants	849
Management Analysts	672
Helpers--Production Workers	631
Packaging and Filling Machine Operators and Tenders	583
Welders, Cutters, Solderers, and Brazers	582
Mixing and Blending Machine Setters, Operators, and Tenders	535
Extruding, Forming, Pressing, and Compacting Machine Setters, Operators, and Tenders	487
Extruding and Forming Machine Setters, Operators, and Tenders, Synthetic and Glass Fibers	486
Electrical Engineers	453

**Table 8 (continued)**

<b>Occupation</b>	<b>Employed in Augusta MSA</b>
Industrial Engineers	453
Architectural and Engineering Managers	395
Industrial Production Managers	363
Machinists	316
Electronics Engineers, Except Computer	285
Compliance Officers	267
Molding, Coremaking, and Casting Machine Setters, Operators, and Tenders, Metal and Plastic	242
Software Developers, Systems Software	229
Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	207
Paper Goods Machine Setters, Operators, and Tenders	171
Cutting and Slicing Machine Setters, Operators, and Tenders	164
Printing Press Operators	142
Extruding and Drawing Machine Setters, Operators, and Tenders, Metal and Plastic	132

*Source: EMSI, Garner Economics*



**Table 9**  
***Degree Completions in Region\* in Majors Related to Innovative Manufacturing, 2014–15 Academic Year***

Major	Certificate	Associate	Bachelor	Post-Grad
Business, Accounting & Finance	239	105	172	44
Computer & Information Sciences	118	61	22	0
Engineering Technologies	4	42	0	0
Mathematics & Statistics	0	0	11	0
Mechanic & Repair Technologies/Technicians	342	71	0	0
Physical Sciences	0	2	23	0
Precision Production	244	0	0	0
Transportation & Materials Moving	2	0	0	0
<b>Total</b>	<b>949</b>	<b>281</b>	<b>228</b>	<b>44</b>

*\*Since there are no higher education institutions located in Columbia County, this includes graduates from all accredited institutions located in Richmond County: Augusta University (formerly Georgia Regents University), Augusta Technical College, Paine College, Virginia College-Augusta, and Miller-Motte Technical College.*

*Source: National Center for Education Statistics, Garner Economics*

## TARGET 4: ENTREPRENEURIAL & RETAIL DEVELOPMENT



Columbia County has a well-established base of retail and hospitality businesses, primarily clustered in two corridors: Washington Road between Martinez and Evans and the area around the I-20/Jimmie Dyess Parkway interchange. Most of the County's existing

retail development is located in older—and often unattractive—shopping centers, and the *Retail Trade* sector has struggled in recent years, as the County has lost multiple national retailers.

At present, the County's entire inventory of hotels consists of low-cost, limited-service properties located along Jimmie Dyess Parkway that are geared towards visitors to Fort Gordon. The County lacks the type of higher-end properties that are necessary to support the sort of Professional Services businesses discussed in Target 2. Such properties would also allow the County to capture demand from affluent visitors to Augusta National Golf Club, Clarks Hill Lake, and other nearby attractions.

Another issue for Columbia County is the absence of a downtown or other entertainment destination for regional residents or visitors. The potential development of such nodes at Evans Towne Center and the Gateway Development would create appealing locations for the addition of higher-end lodging, dining, and shopping. This would, in turn, provide quality of place enhancements for local employers and create additional entrepreneurship opportunities for new businesses.

Another facet to this target is the effect of teleworking, co-working, and other emerging trends. There are a growing number of individual employees who are able to work remotely, but still seek an office environment outside their homes. Columbia County is an excellent location to attract these types of workers. In addition to the large number of daily out-commuters, Columbia County's proximity to Atlanta and Charlotte makes it fertile ground for entrepreneurs, consultants, and others who could work from shared offices or co-working facilities.

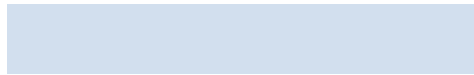
### Rationales

- Centrally located for regional and national markets (P)
- Local and regional traffic along I-20 and U.S. 221 (P)
- Opportunity to capture demand generated from Fort Gordon (P)
- Availability of post-secondary vocational training (P)
- Availability of housing at all price points (P)
- High rate of population and labor force growth (P)
- Young and diverse population base (P)
- High rate of educational attainment (P)
- Opportunity to improve quality of hotels/lodging facilities (C) (P)
- Opportunity to increase labor force participation rate (C)
- Entrepreneurship opportunities for local residents (C)
- High rate of employment growth and specialization in *Accommodation & Food Services* sector (P)
- Strong recent growth in *Food Preparation & Serving Related* and *Personal Care & Service* occupations (P)
- Opportunity to attract/retain workers who presently out-commute (C)
- Average target subsector 2015 national earnings of \$23,473 (P)
- Average target subsector 10-year past employment growth of 16.7% (C)
- Average target subsector projected 10-year job growth of 9.5% (C)
- An existing local pool of high-demand occupations (Table 11) (P)
- Quality of place assets: availability of all types of housing, low cost of living, low crime rate, recreational opportunities, attractive appearance (P)

**Table 10**  
**Entrepreneurial & Retail Development Target Subsectors**

<b>NAICS</b>	<b>Description</b>	<b>National Earnings, 2016</b>	<b>2006–2016 National Job Growth</b>	<b>2016–2026 National Job Growth Forecast</b>	<b>National Job Count, 2016 (Millions)</b>
4452	Specialty Food Stores	\$30,098	0.5%	3.8%	0.23
4481	Clothing Stores	\$23,954	-6.5%	4.9%	1.03
453220	Gift, Novelty, and Souvenir Stores	\$22,436	-22.1%	-14.0%	0.16
4539	Other Miscellaneous Store Retailers	\$35,107	7.6%	7.2%	0.32
531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	\$88,006	0.7%	0.9%	0.15
7211	Traveler Accommodation	\$34,719	5.0%	8.2%	1.85
7224	Drinking Places (Alcoholic Beverages)	\$19,654	5.9%	6.3%	0.38
7225	Restaurants and Other Eating Places	\$20,119	23.0%	11.0%	10.33
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$23,473</b>	<b>16.7%</b>	<b>9.5%</b>	<b>14.46</b>

Source: EMSI, Garner Economics



**Table 11**  
***Entrepreneurial & Retail Development: Augusta MSA Existing Labor Pool of High-Demand Occupations–2016***

<b>Occupation</b>	<b>Employed in Augusta MSA</b>
Retail Salespersons	7,961
Cashiers	6,584
Combined Food Preparation and Serving Workers, Including Fast Food	5,670
Waiters and Waitresses	3,777
First-Line Supervisors of Retail Sales Workers	2,371
Maids and Housekeeping Cleaners	2,086
First-Line Supervisors of Food Preparation and Serving Workers	1,611
Cooks, Restaurant	1,511
Food Preparation Workers	1,283
Dishwashers	662
Amusement and Recreation Attendants	516
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	513
Bartenders	499
Hotel, Motel, and Resort Desk Clerks	486
Dining Room and Cafeteria Attendants and Bartender Helpers	289
Food Service Managers	276
Counter Attendants, Cafeteria, Food Concession, and Coffee Shop	261
First-Line Supervisors of Housekeeping and Janitorial Workers	258
Property, Real Estate, and Community Association Managers	133
Chefs and Head Cooks	108
Lodging Managers	48

*Source: EMSI, Garner Economics*





**Table 12**

***Degree Completions in Region\* in Majors Related to Entrepreneurial & Retail Development, 2014–15 Academic Year***

Major	Certificate	Associate	Bachelor	Post-Grad
Business, Accounting & Finance	239	105	172	44
Parks, Recreation, Leisure & Fitness Studies	10	3	69	9
Personal & Culinary Services	151	22	0	0
Visual & Performing Arts	109	16	21	0
<b>Total</b>	<b>509</b>	<b>146</b>	<b>262</b>	<b>53</b>

*\*Since there are no higher education institutions located in Columbia County, this includes graduates from all accredited institutions located in Richmond County: Augusta University (formerly Georgia Regents University), Augusta Technical College, Paine College, Virginia College-Augusta, and Miller-Motte Technical College.*

*Source: National Center for Education Statistics, Garner Economics*

## TARGET 5: HEALTH SERVICES



The *Health Services* target group presents a major growth opportunity for Columbia County, but the timing, nature, and magnitude of growth in this area hinges on the potential development of a regional hospital in the County. Augusta University has obtained a Certificate of Need

from the state of Georgia to develop a 100-bed hospital, but this approval is currently under appeal. The hospital, which would be located in the Gateway development near Grovetown, is envisioned as a showcase for the use of technology in health care and would offer opportunities for medical residencies and internships. The potential addition of the hospital would immediately add hundreds of jobs at all skill and wage levels to the County and open up opportunities for the addition of businesses that serve the hospital, including diagnostic labs, private practices, and training providers. Pending the results of the appeal, the hospital is expected to open by late 2020.

The proposed hospital has partnership agreements in place with leading international providers of medical equipment, *Health Information Technology*, and laboratory services. These agreements will help create opportunities in other areas of the local economy such as *Health Information Technology* (see Target 2) and *Medical Device Manufacturing* (see Target 3) as well.

If the hospital project does not proceed, the *Health Services* sector in the County will still have opportunities for growth, but it will mostly be limited to serving the local population. Even so, this sector already forms one of the pillars of the County's economy, with more than 4,000 jobs in the local area, 700 of which have been added in the past five years.

This target also includes the care and housing of the elderly: nursing care, continuing care retirement communities, and assisted living facilities. This is becoming a critical issue in Columbia County, as it has a significant base of older residents who will need these services as they age in place.

### Rationales

- Potential addition of new hospital in Gateway area (P) (C)
- Proximity to Medical and Dental Colleges of Georgia (P) (C)
- Availability of skilled medical workers (P)
- Availability of post-secondary training programs at multiple levels for health care professionals (P)
- Availability of on-the-job training assistance (P)
- Availability of labor training incentives (P)
- Quality of local secondary & post-secondary education (P)
- High concentration of workers with STEM degrees (P)
- Recent and expected population growth (P)
- Strong growth in age 65+ population (P)
- Opportunity to retain resident workers within the region (C)
- Potential to make significant improvement to range and quality of health care offered in the local area (C)
- Strong growth in regional *Health Care* sector (C)
- Strong growth in local *Healthcare Practitioners & Technical* occupational group (P)
- Average target subsector national earnings of \$62,181 (C)
- Average target subsector 10-year past employment growth rate: 31.5%
- Average target subsector 10-year forecast employment growth rate: 24.9%
- An existing local pool of high-demand occupations (Table 14) (P)
- Quality of place assets: availability of all types of housing, low cost of living, low crime rate, recreational opportunities, attractive appearance (P)

**Table 13**  
**Health Services Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
611519	Other Technical and Trade Schools	\$54,607	4.6%	3.5%	0.06
621111	Offices of Physicians (Except Mental Health Specialists)	\$103,830	21.3%	18.2%	2.55
621112	Offices of Physicians, Mental Health Specialists	\$69,479	20.0%	17.7%	0.05
621210	Offices of Dentists	\$59,189	18.4%	14.9%	0.93
6213	Offices of Other Health Practitioners	\$49,095	48.7%	34.1%	0.85
6214	Outpatient Care Centers	\$71,413	57.5%	35.1%	0.78
621511	Medical Laboratories	\$72,347	37.5%	29.0%	0.19
621512	Diagnostic Imaging Centers	\$76,119	11.5%	15.6%	0.07
621610	Home Health Care Services	\$35,439	60.8%	43.7%	1.39
623110	Nursing Care Facilities (Skilled Nursing Facilities)	\$39,064	4.7%	9.4%	1.65
623311	Continuing Care Retirement Communities	\$34,431	49.3%	40.7%	0.48
623312	Assisted Living Facilities for the Elderly	\$29,377	33.0%	33.9%	0.41
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$62,181</b>	<b>31.5%</b>	<b>24.9%</b>	<b>9.43</b>

Source: EMSI, Garner Economics

**Table 14**  
**Health Services: Augusta MSA Existing Labor Pool of High-Demand Occupations–2016**

<b>Occupation</b>	<b>Employed in Augusta MSA</b>
Registered Nurses	6,622
Nursing Assistants	2,713
Licensed Practical and Licensed Vocational Nurses	1,915
Home Health Aides	1,350
Medical Assistants	1,082
Physicians and Surgeons, All Other	1,043
Pharmacy Technicians	832
Medical and Health Services Managers	597
Pharmacists	578
Medical Secretaries	563
Medical and Clinical Laboratory Technicians	452
Teachers and Instructors, All Other	446
Radiologic Technologists	443
Medical and Clinical Laboratory Technologists	415
Physical Therapists	373
Respiratory Therapists	337
Medical Records and Health Information Technicians	317
Dental Hygienists	301
Surgical Technologists	301
Nurse Practitioners	275
Family and General Practitioners	268
Health Technologists and Technicians, All Other	258
Healthcare Social Workers	249
Phlebotomists	247
Dietitians and Nutritionists	234
Dentists, General	210



*Table 14 (continued)*

Occupation	Employed in Augusta MSA
Physician Assistants	203
Occupational Therapists	166
Cardiovascular Technologists and Technicians	137
Mental Health Counselors	95
Diagnostic Medical Sonographers	95
Health Educators	91
Rehabilitation Counselors	91
Dental Laboratory Technicians	87
Clinical, Counseling, and School Psychologists	86
Medical Scientists, Except Epidemiologists	75
Magnetic Resonance Imaging Technologists	51

*Source: EMSI, Garner Economics*



**Table 15**  
***Degree Completions in Region\* in Majors Related to Health Services, 2014–15 Academic Year***

Major	Certificate	Associate	Bachelor	Post-Grad
Biological & Biomedical Sciences	0	0	52	31
Health Professions	373	329	283	608
Physical Sciences	0	2	23	0
Psychology	0	0	86	7
<b>Total</b>	<b>373</b>	<b>331</b>	<b>444</b>	<b>646</b>

*\*Since there are no higher education institutions located in Columbia County, this includes graduates from all accredited institutions located in Richmond County: Augusta University (formerly Georgia Regents University), Augusta Technical College, Paine College, Virginia College-Augusta, and Miller-Motte Technical College. Completions at Augusta University include Medical College of Georgia, Dental College of Georgia, and other former components of Georgia Health Sciences University.*

*Source: National Center for Education Statistics, Garner Economics*

**Table 16**  
**Target Subsector Descriptions**

<b>Target 1: Cybersecurity &amp; Government Contracting</b>	
<b>NAICS 517410</b>	<b>Satellite Telecommunications</b>
This industry comprises establishments primarily engaged in providing telecommunications services to other establishments in the telecommunications and broadcasting industries by forwarding and receiving communications signals via a system of satellites or reselling satellite telecommunications.	
<b>NAICS 541330</b>	<b>Engineering Services</b>
This industry comprises establishments primarily engaged in applying physical laws and principles of engineering in the design, development, and utilization of machines, materials, instruments, structures, processes, and systems.	
<b>NAICS 541512</b>	<b>Computer Systems Design Services</b>
This industry comprises establishments primarily engaged in planning and designing computer systems that integrate computer hardware, software, and communication technologies. The hardware and software components of the system may be provided by this establishment or company as part of integrated services or may be provided by third parties or vendors. These establishments often install the system and train and support users of the system.	
<b>NAICS 541513</b>	<b>Computer Facilities Management Services</b>
This industry comprises establishments primarily engaged in providing on-site management and operation of clients' computer systems and/or data processing facilities. Establishments providing computer systems or data processing facilities support services are included in this industry.	
<b>NAICS 541519</b>	<b>Other Computer Related Services</b>
This industry comprises establishments primarily engaged in providing computer related services (except custom programming, systems integration design, and facilities management services). Establishments providing computer disaster recovery services or software installation services are included in this industry.	
<b>NAICS 541712</b>	<b>R&amp;D in the Physical, Engineering, and Life Sciences (Except Biotechnology)</b>
This U.S. Industry comprises establishments primarily engaged in conducting research and experimental development (except biotechnology research and experimental development) in the physical, engineering, and life sciences, such as agriculture, electronics, environmental, biology, botany, computers, chemistry, food, fisheries, forests, geology, health, mathematics, medicine, oceanography, pharmacy, physics, veterinary and other allied subjects.	
<b>NAICS 561210</b>	<b>Facilities Support Services</b>
This industry comprises establishments primarily engaged in providing operating staff to perform a combination of support services within a client's facilities. Establishments in this industry typically provide a combination of services, such as janitorial, maintenance, trash disposal, guard and security, mail routing, reception, laundry, and related services to support operations within facilities.	
<b>NAICS 611420</b>	<b>Computer Training</b>
This industry comprises establishments primarily engaged in conducting computer training (except computer repair), such as computer programming, software packages, computerized business systems, computer electronics technology, computer operations, and local area network management. Instruction may be provided in diverse settings, such as the establishment's or client's training facilities, educational institutions, the workplace, or the home, and through diverse means, such as correspondence, television, the Internet, or other electronic and distance-learning methods.	

**Table 16 (continued)**

<b>Target 1: Cybersecurity &amp; Government Contracting (continued)</b>	
<b>NAICS 811212</b>	<b>Computer and Office Machine Repair and Maintenance</b>
This industry comprises establishments primarily engaged in repairing and maintaining computers and office machines without retailing new computers and office machines, such as photocopying machines; computer terminals, storage devices, and printers; and CD-ROM drives.	
<b>NAICS 811213</b>	<b>Communication Equipment Repair and Maintenance</b>
This industry comprises establishments primarily engaged in repairing and maintaining communications equipment without retailing new communication equipment, such as telephones, fax machines, communications transmission equipment, and two-way radios.	
<b>NAICS 811219</b>	<b>Other Electronic and Precision Equipment Repair and Maintenance</b>
This industry comprises establishments primarily engaged in repairing and maintaining (without retailing) electronic and precision equipment (except consumer electronics, computers and office machines, and communications equipment). Establishments in this industry repair and maintain equipment, such as medical diagnostic imaging equipment, measuring and surveying instruments, laboratory instruments, and radar and sonar equipment.	
<b>Target 2: High-Value Professional Services</b>	
<b>NAICS 511210</b>	<b>Software Publishers</b>
This industry comprises establishments primarily engaged in computer software publishing or publishing and reproduction. Establishments in this industry carry out operations necessary for producing and distributing computer software, such as designing, providing documentation, assisting in installation, and providing support services to software purchasers. These establishments may design, develop, and publish, or publish only.	
<b>NAICS 518210</b>	<b>Data Processing, Hosting, and Related Services</b>
This industry comprises establishments primarily engaged in providing infrastructure for hosting or data processing services. These establishments may provide specialized hosting activities, such as web hosting, streaming services or application hosting; provide application service provisioning; or may provide general time-share mainframe facilities to clients.	
<b>NAICS 5411</b>	<b>Legal Services</b>
This industry comprises offices of legal practitioners known as lawyers or attorneys (i.e., counselors-at-law) primarily engaged in the practice of law. Establishments in this industry may provide expertise in a range or in specific areas of law, such as criminal law, corporate law, family and estate law, patent law, real estate law, or tax law. It additionally includes the offices of notaries, title abstract and settlement offices, and all other legal services.	
<b>NAICS 5412</b>	<b>Accounting, Tax Preparation, Bookkeeping, and Payroll Services</b>
This U.S. industry comprises establishments of accountants that are certified to audit the accounting records of public and private organizations and to attest to compliance with generally accepted accounting practices. Offices of certified public accountants (CPAs) may provide one or more of the following accounting services: (1) auditing financial statements; (2) designing accounting systems; (3) preparing financial statements; (4) developing budgets; and (5) providing advice on matters related to accounting. These establishments may also provide related services, such as bookkeeping, tax return preparation, and payroll processing.	
<b>NAICS 541511</b>	<b>Customer Computer Programming Services</b>
This industry comprises establishments primarily engaged in writing, modifying, testing, and supporting software to meet the needs of a particular customer.	



**Table 16 (continued)**

<b>Target 2: High-Value Professional Services (continued)</b>	
<b>NAICS 54161</b>	<b>Management Consulting Services</b>
This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on management issues, such as strategic and organizational planning; financial planning and budgeting; marketing objectives and policies; human resource policies, practices, and planning; production scheduling; and control planning.	
<b>NAICS 551114</b>	<b>Corporate, Subsidiary, and Regional Management Offices</b>
This industry comprises establishments (except government establishments) primarily engaged in administering, overseeing, and managing other establishments of the company or enterprise. These establishments normally undertake the strategic or organizational planning and decision making role of the company or enterprise. Establishments in this industry may hold the securities of the company or enterprise.	
<b>NAICS 561110</b>	<b>Office Administrative Services</b>
This industry comprises establishments primarily engaged in providing a range of day-to-day office administrative services such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics for others on a contract or fee basis. These establishments do not provide operating staff to carry out the complete operations of a business.	
<b>NAICS 5614</b>	<b>Business Support Services</b>
This industry includes a range of sectors that provide services to other business types, including document preparation, telephone call centers, business service centers, collection agencies, credit bureaus, repossession, court reporting, and other related services.	
<b>Target 3: Innovative Manufacturing</b>	
<b>NAICS 3114</b>	<b>Fruit &amp; Vegetable Preserving and Specialty Food Manufacturing</b>
This industry group includes (1) establishments that freeze food and (2) those that use preservation processes, such as pickling, canning, and dehydrating. Both types begin their production process with inputs of vegetable or animal origin.	
<b>NAICS 3118</b>	<b>Bakeries and Tortilla Manufacturing</b>
This industry comprises establishments primarily engaged in manufacturing fresh and frozen bread, cookies, crackers, pasta, tortillas, and other bakery products.	
<b>NAICS 3119</b>	<b>Other Food Manufacturing</b>
This industry group comprises establishments primarily engaged in manufacturing food (except animal food; grain and oilseed milling; sugar and confectionery products; preserved fruit, vegetable, and specialty foods; dairy products; meat products; seafood products; and bakeries and tortillas). The industry group includes industries with different production processes, such as snack food manufacturing; coffee and tea manufacturing; concentrate, syrup, condiment, and spice manufacturing; and, in general, an entire range of other miscellaneous food product manufacturing.	
<b>NAICS 312111</b>	<b>Soft Drink Manufacturing</b>
This industry comprises establishments primarily engaged in manufacturing soft drinks and artificially carbonated waters.	
<b>NAICS 333111</b>	<b>Farm Machinery &amp; Equipment Manufacturing</b>
This industry comprises establishments primarily engaged in manufacturing agricultural and farm machinery and equipment, and other turf and grounds care equipment, including planting, harvesting, and grass mowing equipment (except lawn and garden-type).	



**Table 16 (continued)**

<b>Target 3: Innovative Manufacturing (continued)</b>	
<b>NAICS 33399</b>	<b>All Other General Purpose Machinery Manufacturing</b>
This industry comprises establishments primarily engaged in manufacturing general purpose machinery (except ventilation, heating, air-conditioning, and commercial refrigeration equipment; metal working machinery; engines, turbines, and power transmission equipment; pumps and compressors; and material handling equipment).	
<b>NAICS 336999</b>	<b>All Other Transportation Equipment Manufacturing</b>
This U.S. industry comprises establishments primarily engaged in manufacturing transportation equipment (except motor vehicles, motor vehicle parts, boats, ships, railroad rolling stock, aerospace products, motorcycles, bicycles, armored vehicles and tanks). This includes golf carts and similar motorized passenger carriers.	
<b>NAICS 33911</b>	<b>Medical Equipment and Supplies Manufacturing</b>
This industry comprises establishments primarily engaged in manufacturing medical equipment and supplies. Examples of products made by these establishments are surgical and medical instruments, surgical appliances and supplies, dental equipment and supplies, orthodontic goods, ophthalmic goods, dentures, and orthodontic appliances.	

*Table 16 (continued)*

<b>Target 4: Entrepreneurial &amp; Retail Development</b>	
<b>NAICS 4452</b>	<b>Specialty Food Stores</b>
This industry group comprises establishments primarily engaged in retailing specialized lines of food.	
<b>NAICS 4481</b>	<b>Clothing Stores</b>
This industry group comprises establishments primarily engaged in retailing new clothing.	
<b>NAICS 453220</b>	<b>Gift, Novelty, and Souvenir Stores</b>
This industry comprises establishments primarily engaged in retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations, and curios.	
<b>NAICS 4539</b>	<b>Other Miscellaneous Store Retailers</b>
This industry group comprises establishments primarily engaged in retailing new miscellaneous specialty store merchandise, including pets and pet supplies, art and art supplies, tobacco, candles, and collectors' items.	
<b>NAICS 531120</b>	<b>Lessors of Nonresidential Buildings (except Miniwarehouses)</b>
This industry comprises establishments primarily engaged in acting as lessors of buildings (except miniwarehouses and self-storage units) that are not used as residences or dwellings. Included in this industry are: (1) owner-lessors of nonresidential buildings; (2) establishments renting real estate and then acting as lessors in subleasing it to others; and (3) establishments providing full service office space, whether on a lease or service contract basis.	
<b>NAICS 7211</b>	<b>Traveler Accommodation</b>
This industry comprises establishments primarily engaged in providing short-term lodging in facilities known as hotels, motor hotels, resort hotels, and motels. The establishments in this industry may offer food and beverage services, recreational services, conference rooms and convention services, laundry services, parking, and other services.	
<b>NAICS 7224</b>	<b>Drinking Places (Alcoholic Beverages)</b>
This industry comprises establishments known as bars, taverns, nightclubs, or drinking places primarily engaged in preparing and serving alcoholic beverages for immediate consumption. These establishments may also provide limited food services.	
<b>NAICS 7225</b>	<b>Restaurants and Other Eating Places</b>
This industry comprises establishments primarily engaged in one of the following: (1) providing food services to patrons who order and are served while seated (i.e., waiter/waitress service), and pay after eating; (2) providing food services to patrons who generally order or select items (e.g., at a counter, in a buffet line) and pay before eating; or (3) preparing and/or serving a specialty snack (e.g., ice cream, frozen yogurt, cookies) and/or nonalcoholic beverages (e.g., coffee, juices, sodas) for consumption on or near the premises.	

**Table 16 (continued)**

<b>Target 5: Health Services</b>	
<b>NAICS 611519</b>	<b>Other Technical and Trade Schools</b>
This industry comprises establishments primarily engaged in offering job or career vocational or technical courses (except cosmetology and barber training, aviation and flight training, and apprenticeship training). The curriculums offered by these schools are highly structured and specialized and lead to job-specific certification.	
<b>NAICS 621111</b>	<b>Offices of Physicians (Except Mental Health Specialists)</b>
This industry comprises establishments of health practitioners having the degree of M.D. (Doctor of Medicine) or D.O. (Doctor of Osteopathy) primarily engaged in the independent practice of general or specialized medicine (except psychiatry or psychoanalysis) or surgery. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.	
<b>NAICS 621112</b>	<b>Offices of Physicians, Mental Health Specialists</b>
This industry comprises establishments of health practitioners having the degree of M.D. (Doctor of Medicine) or D.O. (Doctor of Osteopathy) primarily engaged in the independent practice of psychiatry or psychoanalysis. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.	
<b>NAICS 621210</b>	<b>Offices of Dentists</b>
This industry comprises establishments of health practitioners having the degree of D.M.D. (Doctor of Dental Medicine), D.D.S. (Doctor of Dental Surgery), or D.D.Sc. (Doctor of Dental Science) primarily engaged in the independent practice of general or specialized dentistry or dental surgery. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers. They can provide either comprehensive preventive, cosmetic, or emergency care, or specialize in a single field of dentistry.	
<b>NAICS 6213</b>	<b>Offices of Other Health Practitioners</b>
This industry comprises a range of health care professionals, including chiropractors, optometrists, mental health practitioners, physical, occupational and speech therapists, audiologists, podiatrists, and other areas of expertise.	
<b>NAICS 6214</b>	<b>Outpatient Care Centers</b>
This industry includes establishments that provide specialized outpatient treatment such as family planning, mental health, substance abuse treatment, kidney dialysis, ambulatory surgery, and emergency care.	
<b>NAICS 621511</b>	<b>Medical Laboratories</b>
This industry comprises establishments known as medical laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis, generally to the medical profession or to the patient on referral from a health practitioner.	
<b>NAICS 621512</b>	<b>Diagnostic Imaging Centers</b>
This industry comprises establishments known as diagnostic imaging centers primarily engaged in producing images of the patient generally on referral from a health practitioner.	



**Table 16 (continued)**

<b>Target 5: Health Services (continued)</b>	
<b>NAICS 621610</b>	<b>Home Health Care Services</b>
This industry comprises establishments primarily engaged in providing skilled nursing services in the home, along with a range of the following: personal care services; homemaker and companion services; physical therapy; medical social services; medications; medical equipment and supplies; counseling; 24-hour home care; occupation and vocational therapy; dietary and nutritional services; speech therapy; audiology; and high-tech care, such as intravenous therapy.	
<b>NAICS 623110</b>	<b>Nursing Care Facilities (Skilled Nursing Facilities)</b>
This industry comprises establishments primarily engaged in providing inpatient nursing and rehabilitative services. The care is generally provided for an extended period of time to individuals requiring nursing care. These establishments have a permanent core staff of registered or licensed practical nurses who, along with other staff, provide nursing and continuous personal care services.	
<b>NAICS 623311</b>	<b>Continuing Care Retirement Communities</b>
This industry comprises establishments primarily engaged in providing a range of residential and personal care services with on-site nursing care facilities for (1) the elderly and other persons who are unable to fully care for themselves and/or (2) the elderly and other persons who do not desire to live independently. Individuals live in a variety of residential settings with meals, housekeeping, social, leisure, and other services available to assist residents in daily living. Assisted living facilities with on-site nursing care facilities are included in this industry.	
<b>NAICS 623312</b>	<b>Assisted Living Facilities for the Elderly</b>
This industry comprises establishments primarily engaged in providing residential and personal care services (i.e., without on-site nursing care facilities) for (1) the elderly or other persons who are unable to fully care for themselves and/or (2) the elderly or other persons who do not desire to live independently. The care typically includes room, board, supervision, and assistance in daily living, such as housekeeping services.	

## CHAPTER 3: WHERE COLUMBIA COUNTY SHOULD GO FROM HERE—A SITE SELECTOR’S PERSPECTIVE



To ensure that Columbia County can leverage its many assets and strengthen its business climate to retain the companies it has, as well as attract its business targets and leverage the potential synergies with the Cyber Command, the DACC and the County must be proactive in driving and shaping Columbia County’s economic future and setting it apart from other peer jurisdictions.

The following observations, conclusions, and recommendations are based on data and feedback collected during Phase I and noted in the previously cited **COMPETITIVE REALITIES REPORT**. They also build upon the assessments made to prioritize the business targets identified in Chapter 2.

As noted in the introductory chapters, this assessment—and the observations therein—were developed from a site selector’s perspective. The recommendations are built with an eye toward those areas that will differentiate Columbia County. The goal of this strategy is to provide a framework for the County to consider its economic development service delivery and activities to support and augment the work of the DACC and other County departments and organizations involved in economic development. Therefore, these recommendations are designed to go beyond traditional recruitment, expansion, and retention activities. The recommendations look at Columbia County and its economic future holistically and explore ways to better connect and leverage the County’s talent and workforce, entrepreneurship, infrastructure, and business climate.

As with any strategy, there will be some elements that the County—and the DACC in particular—can take on independently. There will be other initiatives that will need to be taken in collaboration with others or in support of others. The DACC will be a champion for the initiatives as a means to improve the County’s competitiveness as a place to do business and one that can attract the types of talent that will drive the economy for years to come. The recommendations were written so as to calibrate the County’s actions to its specific role.

Garner Economics developed the conclusions and recommendations with the following principles for Columbia County in mind:

- **Undertake economic development activities holistically.** The DACC’s economic development activity must be developed in the context of work being done to strengthen not only the County, but also the entire region. As noted frequently in the **COMPETITIVE REALITIES REPORT**, Columbia County is part of a dynamic and changing region. It has the opportunity to better collaborate with and leverage the strengths of its neighbors. One goal of the strategy is to identify those areas where Columbia County can both attract and retain jobs and also support efforts within the broader region (e.g., Fort Gordon) to build a stronger community and to be the chosen home for those jobs. Hence, the recommendations were created in the context of the Greater Augusta region’s growth. They provide a framework to capitalize on the County’s unique assets while also strengthening the County’s current “market” conditions.

- **Be a leader.** The success of the economic development strategy will depend not only on the changes the DACC makes regarding how it services its clients and driving the economic development program, but also on its ability to be a leader within the County that makes the case for such collaboration and change. Where there continues to be disagreement as to the County's future growth trajectory, the DACC should work to build consensus around paths that are realistic given the County's assets and potential, as well as around those that provide a strong enough value proposition to differentiate Columbia from its competitors and peers. Going forward, the economic development leaders in the County should make the case for how these new initiatives or changes in policies will improve the County's business climate and quality of place and, in turn, its ability to provide world-class economic development service delivery and opportunities for those it serves.
- **Fully leverage the presence and potential of Fort Gordon.** According to the *Augusta Chronicle* and Army personnel, nearly half of the 4,700 military and civilian positions being created in Augusta by the relocation of Fort Meade units have already been filled. Counting spouses and other family members, the Army estimates the new jobs will bring a total of 13,000 new residents to the metro area by 2020, about 2,400 of whom will be school-age children.

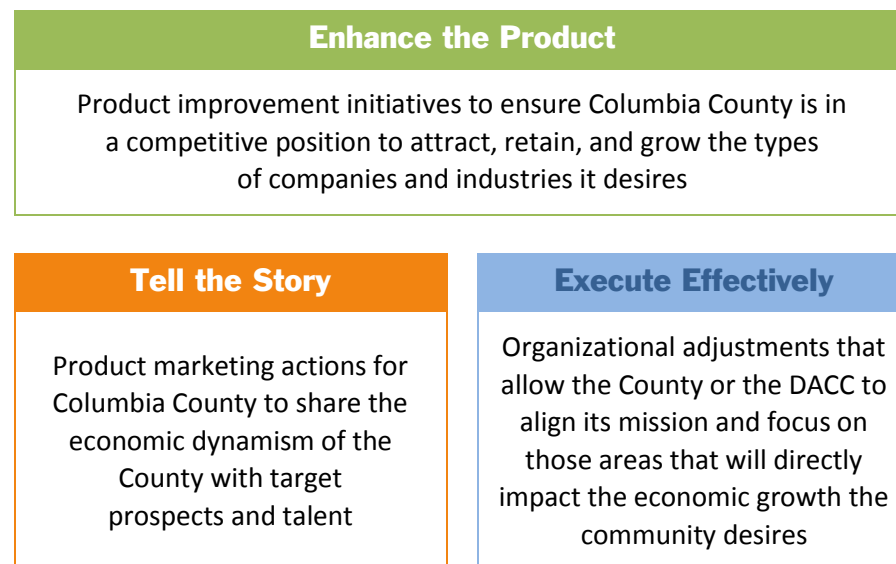
Moreover, the growth and expansion of the Department of Defense's Cyber Center of Excellence at Fort Gordon has resulted in more than 12,000 military personnel receiving cybersecurity training at Fort Gordon each year. Additional personnel will move to the area as a result of the expansion of the National Security Agency and other related commands. To say that the expansion of Fort Gordon will have a profound impact on the region is an understatement.

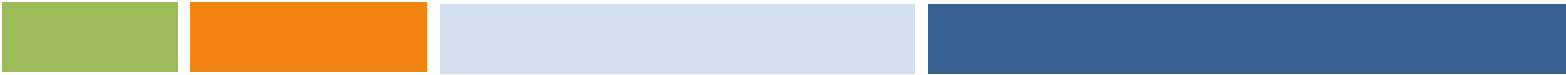
Columbia County is at an inflexion point at which it can seize a truly transformative opportunity to reposition its workforce and take leadership in an emerging industry that will pervade all facets of the economy. All economic development organizations in the region need to continue to be proactive in leveraging this tremendous asset capitalize on this economic engine.

Recommendations for action are categorized under three areas of opportunity: Enhance the Product (Product Improvement), Tell the Story (Marketing), and Execute Effectively (Organizational). In some instances, and where relevant and possible, a cost estimate to implement the noted recommendation has been offered.

An estimated timeline for the optimal application of the recommendations is included in the Recommendations Summary table on page 66.

**FIGURE 13: AN ECONOMIC DEVELOPMENT STRATEGY FOR COLUMBIA COUNTY**







## ENHANCE THE PRODUCT (PRODUCT IMPROVEMENT)

### Strategy:

Strengthen the County's assets in key areas that support the DACC's goal of attracting and growing more high-quality economic activities in the area, while protecting the quality of the community.

### Goal/Results:

Columbia County transforms itself from a predominantly bedroom community to one that better leverages its economic fundamentals, strong educational assets, and proximity to Fort Gordon. In doing so, the County will strengthen its business climate and quality of place to attract a talented workforce and innovative companies.

The County "product" is defined as the infrastructure—including a favorable business climate—needed to attract investment to Columbia County. Local marketing efforts will only be successful if the County has a community "product" to sell. This includes sites and buildings; a strong, well-maintained, and planned transportation infrastructure; utility infrastructure; workforce development; entrepreneurship; and incentives.

### 1. Create a culture, programs, and support infrastructure for entrepreneurship in Columbia County

**Observation:** The Kauffman Foundation suggests that, nationally, new firms and young businesses disproportionately contribute to net job creation throughout the economy and account for more than two-thirds of gross job creation. Data from the [COMPETITIVE REALITIES REPORT](#) suggest that such activity is weak in Columbia County. Measuring the relative proportion of persons who are *Self-Employed* is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of the local propensity for risk-taking and the area's economic dynamism.

**Harnessing Opportunities and Talent: An Economic Development Strategy for Columbia County**

### Self-Employed Workers

	Self-Employed in Own Incorporated Business	Self-Employed in Own Not Incorporated Business	Unpaid Family Workers	Total
Columbia County	3.1%	4.9%	0.2%	8.2%
Forsyth County	5.1%	6.0%	0.2%	11.2%
Williamson County	4.2%	9.6%	0.4%	14.1%
Georgia	4.0%	5.6%	0.2%	9.7%
United States Total	3.4%	6.0%	0.2%	9.6%

Source: U.S. Census Bureau, Garner Economics

For all civilian workers aged 16 and over, a total of 8.2 percent of workers in Columbia County were classified as *Self-Employed*. Of these, 3.1 percent of the establishments were *Incorporated* and 4.9 percent were *Not Incorporated* or an *Unpaid Family Worker*.

The current self-employment rate for Columbia County is below the self-employment rate of all of the benchmarks.

**Recommendation:** The DACC and County government should partner with the University System of Georgia and Technical College System of Georgia to create a small business incubator and/or startup accelerator facility and related programs to grow entrepreneurship in the area and to help local entrepreneurs mitigate losses and challenges that contribute to the failure of startup companies. The International Business Innovation Association defines business incubators as "facilities and programs that nurture the development of entrepreneurial companies, helping them survive and grow during the startup period, when they are most vulnerable." The Association goes on to suggest that programs provided by such business incubators should support client companies with business support services and resources needed by young firms. According to this data, the most common goals of such programs include

job creation, employer/company retention, accelerating or nurturing growth in a local industry, diversifying the local economy, and/or supporting and growing the innovation ecosystem in a given area.

According to the State of the Business Incubation Industry, as of 2012, there were roughly 1,200 incubators in the United States, up from 12 in 1980. Of these incubators:

- About 32 percent are sponsored by academic institutions
- 25 percent are sponsored by economic development organizations
- 16 percent are sponsored by government entities
- 4 percent are sponsored by other types of organizations
- 4 percent of business incubators are “hybrids” with more than one sponsor
- 4 percent are sponsored by for-profit entities
- 15 percent of incubators have no sponsor or host organization

Based on observations of successful incubation programs and facilities—and validated by the statistics noted above—the Garner Economics team believes that the best chance for success in cultivating a stronger entrepreneur community in Columbia County is a joint collaboration between higher education and the DACC. Ideally, a business incubator is managed by an academic institution and professors and experts serve as a resource to the entrepreneurs that are housed at the facility. The incubator/accelerator could be housed at a location at a College or in a County facility conducive for this work environment. The location should be easily accessible by the entrepreneurs, other business representatives who can act as mentors, and the college community (both students and faculty).

Typically, incubators and accelerators will offer the following business consulting to help entrepreneurs and small-business, second-stage companies:

- Accounting
- Finances
- Human resources
- Web design
- Life strategy coaching
- Federal acquisition
- Patents
- Business management
- Marketing and branding
- Process improvement
- Infrastructure development

#### **Best practice examples:**

- AB Tech Community College (Asheville, North Carolina)  
<https://www.abtech.edu/content/business-incubation-program/program-information>
- Newboco - Cedar Rapids, Iowa  
<http://newbo.co/>

**Lead Organizations:** DACC, Augusta University, Augusta Technical College

## **2. Create a plan to improve gateways into the County—including new signage, landscaping, and beautification initiatives**

**Observation:** As reiterated by focus group participants and survey respondents, the gateways into Columbia County from Interstate 20 are either nondescript or aesthetically displeasing. The lack of a memorable gateway sets an ambivalent or negative first impression of the community.



**Recommendation:** As a way to welcome both visiting talent and potential businesses, the County should work to improve major gateways into the County by enhancing landscaping and improving esthetics. The County should encourage redevelopment or refurbishing of structures near the gateways to complement the facelift. By improving the overall appearance of the County and by building upon the County's brand, the County can differentiate the community from others in the area and build a sense of community pride.

The Keep Columbia Beautiful campaign is a great start to this. However, the current effort, part of County government, is more of a green/sustainability initiative than an ongoing beautification effort. As noted on the County website, the campaign's vision is to "enhance the quality of life in Columbia County by implementing a comprehensive recycling program that will reduce landfill disposal of solid waste and preserve natural resources." The campaign's programs are educational and work to emphasize the benefits and need to maintain a "green" lifestyle.

While the above is a laudable vision, more should be done to enhance other facets of community aesthetics unrelated to decreasing litter or recycling. The presence of unattractive signage, junk cars, dilapidated housing, and other eyesores detract investment. Conversely, the "charm factor" or the genuine authenticity of an area is an important component to business attraction and investment. A more comprehensive community beautification initiative would have an immediate impact on enhancing the brand and identity of the County.

#### Best practice examples:

- **Jersey City, New Jersey:** The Jersey City, New Jersey, Gateway Beautification program sought to enhance the appearance of the Gateway areas and to make them safer by upgrading planting and maintenance of trees, shrubs, evergreens, and flowering plants and installing paved walkways and crosswalks, decorative steel fencing, flag and banner poles, and lighting. The program is run by the Jersey City Division of Economic Development.  
<http://www.jcedc.org/Pages/beautification.html>
- **Midland, Michigan:** The wayfinding and gateways program in Midland, Michigan, reflects the Frank Lloyd Wright-inspired architecture on gateways, parks, and recreational areas. The case for such an extensive wayfinding program is in reinforcing the entire urban brand through placemaking.
- **City of Fairhope, Alabama:** In 2000, the city competed in the Nations in Bloom competition and placed third for cities in its population category. This competition recognized cities and towns internationally for landscape and environmental stewardship. Since 2001, the city has added two tree trails, implemented a tree recognition program, and planted more than 100 trees for its Centennial in 2008. The city has continued to add flower beds throughout town and sidewalks to connect neighborhoods and schools.



**Lead Organizations:** Columbia County Commission

### 3. Develop a real estate portfolio of additional sites for manufacturing and office development.

**Observation:** Another potential detriment to Columbia County’s ability to attract and, perhaps, retain high-end business investment is the County’s lack of fully served office and manufacturing sites. A site is defined as a parcel of property for sale or lease with a published price and with the necessary infrastructure in place with a size and capacity that would attract the investment. The availability of quality manufacturing and office sites and buildings is a challenge in Columbia County. The **COMPETITIVE REALITIES REPORT** detailed that the availability and access to industrial, office, and retail space in Columbia County are lower than that of most of the peer communities. Looking at the County from a site-selection advisor’s perspective, Garner Economics would classify the situation as an **extreme** challenge.

According to CoStar, a real estate data aggregator, industrial space exists in Columbia County with an 18.4 percent vacancy rate. However, much of what is available is dated and does not show well to potential clients. CoStar shows that no Class A office space exists in the County and that Class B space is limited, with a paltry 5 percent vacancy rate. Retail space is in even shorter supply, with a 1 percent vacancy rate in the County. Moreover, considering the recommended business sector targets detailed in Chapter 3, the growing lack of shovel-ready office and manufacturing is currently an immediate and inherent problem for the County.

A key element of any economic development strategy is a community’s ability to utilize in-place real estate (e.g., sites, buildings, and infrastructure) to support key target sectors. Better alignment between real estate opportunities and economic development goals would serve the business needs of a variety of activities the DACC is hoping to encourage, ranging from startups, local market infill, and expansion opportunities.

**Recommendation:** Feedback from several focus groups suggests that the community places a high priority on supporting business ventures of all sizes and classifications. For Columbia County to be more than a bedroom community and to improve its ability to attract more than only wage service jobs, the area must build a scalable real estate portfolio that facilitates multiple growth stages of a business. Figure 14 outlines the typical stages of company growth and the real estate asset types required by each stage.

**FIGURE 14: STAGES OF COMPANY GROWTH AND CORRELATING ASSET TYPES**

Growth Stage	Business Characteristics	Asset Types
<b>Concept</b>	Design and Development of Product, Services, Technology Applications, and Brand	<ul style="list-style-type: none"> <li>Office Incubator Space</li> <li>R&amp;D Incubator Space</li> </ul>
<b>Inception</b>	Prototype of Product	<ul style="list-style-type: none"> <li>Office Incubator Space</li> <li>R&amp;D Incubator Space (Prototype)</li> <li>Manufacturing Space (Small Cell)</li> </ul>
<b>Survival</b>	Growth in Customers and Human Resources (Small Volume Manufacturing)	<ul style="list-style-type: none"> <li>Office Space (Longer-term lease)</li> <li>Manufacturing Space</li> </ul>
<b>Growth</b>	Full Production Capability and Capacity, Inventory Management, Management Systems	<ul style="list-style-type: none"> <li>Office Space</li> <li>Manufacturing Space</li> </ul>
<b>Expansion</b>	Broaden Operating Capabilities, Geographical Markets, and Channels	<ul style="list-style-type: none"> <li>Headquarter Facility</li> <li>Laboratory Facility</li> <li>Manufacturing Facility</li> <li>Distribution Centers</li> <li>Call Centers</li> <li>Data Centers</li> </ul>
<b>Maturity</b>	Cost Focus and Market Growth	<ul style="list-style-type: none"> <li>Headquarter Facility</li> <li>Laboratory Facility</li> <li>Manufacturing Facility</li> <li>Distribution Centers</li> <li>Call Centers</li> <li>Data Centers</li> </ul>

**FIGURE 15: REAL ESTATE NEEDS OF TARGET BUSINESS SECTORS**

In addition to supporting key business segments, the County real estate portfolio should be aligned with the requirements of the County's target business sectors. As noted in Chapter 2, five optimal targets were recommended as key business sectors for the County given its assets and existing workforce. The figure below identifies the correlating asset types with each of the primary target industries.

<b>Optimal Target Sectors</b>	<b>Primary Functions</b>	<b>Typical Asset Types</b>
<b>Retail &amp; Entrepreneurial</b>	<ul style="list-style-type: none"> <li>Administration</li> <li>Product development</li> <li>Testing</li> <li>Manufacturing</li> <li>Distribution</li> <li>Retail</li> <li>Services</li> </ul>	<ul style="list-style-type: none"> <li>Office</li> <li>Laboratory</li> <li>Office/Call Centers</li> <li>General retail</li> </ul>
<b>Cybersecurity &amp; Government Contracting/High-Value Professional Services</b>	<ul style="list-style-type: none"> <li>Administration</li> <li>Accounting</li> <li>Data management</li> <li>Scientific research</li> <li>Design &amp; Testing</li> <li>Analysis</li> </ul>	<ul style="list-style-type: none"> <li>Primary &amp; back office</li> <li>Office</li> <li>Data Center</li> <li>Laboratory office</li> <li>Office and testing facilities</li> <li>SCIF space</li> </ul>
<b>Health Services</b>	<ul style="list-style-type: none"> <li>Administration</li> <li>Research &amp; Development</li> <li>Data management &amp; Software development</li> <li>Manufacturing</li> <li>Health &amp; wellness providers</li> </ul>	<ul style="list-style-type: none"> <li>Primary &amp; back office</li> <li>Laboratory</li> <li>Data center</li> <li>Medical office</li> </ul>
<b>Innovative Manufacturing</b>	<ul style="list-style-type: none"> <li>Administration</li> <li>Light manufacturing</li> <li>Intensive manufacturing</li> <li>Product development</li> <li>Distribution</li> </ul>	<ul style="list-style-type: none"> <li>Office</li> <li>Light industrial</li> <li>General industrial</li> <li>Laboratory</li> <li>Warehousing</li> </ul>

Based on the Garner Economics Team’s site-location experience, we estimate that, given the geographic size of Columbia County, there will be a potential gap of 1,000 developable acres of inventory for manufacturing and office use if the DACC pursues the recommended business sector targets and undertakes the marketing initiatives described below.

The first step in building an adequate real estate portfolio will be to identify existing or potential sites to add to the County’s inventory. While the Garner Economics Team is very familiar with real estate feasibility given our engagement with real estate professionals when brokering site location advice, the DACC should engage a national real estate brokerage firm (with no local conflict of interest) to identify such properties in Columbia County. A larger and more robust portfolio is necessary and would allow the DACC and other entities to master plan the County for future business growth and create a funding plan for executing the acquisition plan.

**Lead organization:** DACC

**Cost:** \$20,000–25,000



#### 4. Develop an office/R&D park near one of Fort Gordon's entrances and joint venture with the private sector to create a speculative building with a Sensitive Compartmented Information Facility (SCIF)

**Observation:** High-level representatives from Fort Gordon and the planned growth of cyber commands on post have noted that one of the prerequisites to be able to attract cybersecurity contractors is the availability of Sensitive Compartmented Information Facility (SCIF) space. A SCIF is a U.S. Government accredited facility where highly sensitive classified information can be securely stored, conversations including such information can take place, or where the information can be electronically processed. Primarily, government and government-related contractors that analyze or employ high security, highly classified material require SCIFs. The areas of concern and special attention typically include physical security and hardening, acoustic controls, visual controls, access control, electronic and TEMPEST (Telecommunications Electronics Material Protected from Emanating Spurious Transmissions or Emissions) security.

The minimum requirements for SCIFs are defined in Intelligence Community Directive (ICD) 705/IC Technical Specification. The directive describes many specialized construction requirements to ensure that high security features are built into the facility beyond those achieved by typical commercial construction.

**Recommendation:** Many municipal governments incentivize economic development by offering industrial, business, or office parks when developers don't take the development risk. This is often found in smaller communities where private resources may be limited and municipal financial participation serves as a catalyst in facilitating effective, positive growth. In the case of Columbia County and the business sector targets offered in this report and strategy, it is recommended that the County work in creating an office/business park, which would be municipally owned. The development of SCIF space has been noted as a significant and real need by Fort Gordon personnel. Ideally, a private developer should work to create an office environment that would include SCIF space in the attraction of office tenants to Columbia County serving the cybersecurity and intelligence needs of Fort Gordon and the NSA. Ideally, the County would defer the cost and subsidize or gift specific parcels of land in the office park to attract developers for the development of SCIF space, based on certain clawback provisions related to the timing of construction, size of the investment, number of jobs that the facility would attract, and more.



**Cyber Operations Center  
at Fort Gordon**

This recommendation is tied inextricably to the recommendation above in creating a real estate portfolio of available sites for short- and long-term needs.

**Best practice example:** The National Cyber Research Park (NCRP), Bossier City, LA; <http://cyberinnovationcenter.org/>

**Lead organizations:** DACC, Columbia County Commission

**5. Create a long-term Tax Increment Financing (TIF) and Tax Allocation District (TAD) financing strategy to help fund public infrastructure and private development related to the targeted business sectors**

**Observation:** Georgia's Redevelopment Powers Law was adopted by the general assembly in 1985 and gives local governments (cities and counties) the authority to sell bonds to finance infrastructure and other redevelopment costs within a specially defined area, a tax allocation district (TAD). The bonds are secured by a tax allocation increment which is the increase in the property tax revenues resulting from redevelopment activities occurring. As public improvements and private investment take place in a TAD, the taxable value of property increases. The city/county collects those revenues, leveraging the increase due to the investment into new investments in a special fund to pay off bonds or loans that finance the public improvements in the district.

The tax increment is the difference between the amount of property tax revenue generated when the TAD is established (the base year) and the amount of property tax revenue generated after the TAD designation. Such a financing structure is referred to as Tax Increment Financing (TIF). When a TAD is created, the State Department of Revenue sets the base value for the district. Any growth in the property tax revenues resulting from increases in property values above the base values are collected in a special fund and used for redevelopment costs in the TAD. Only property taxes generated by the incremental increase in the values of these properties are available for use by the TAD.

**Recommendation:** In Columbia County, Grovetown and Harlem have TADs, and Martinez is designated as an Opportunity Zone ([http://developcolumbiacounty.com/site\\_selection/opportunity\\_zone](http://developcolumbiacounty.com/site_selection/opportunity_zone)). As Fort Gordon continues to expand and have a significant multiplier effect on the County, some or most of that growth may occur in unincorporated Columbia County. As such, it is incumbent upon the County to have a well-defined and thoughtful TAD strategy (including options to finance such investment).

There are several law firms in Georgia that specialize in TADs, TIFs, and other community financing and tax incentives. The DACC, as the economic development agent for the County Commission, should solicit representation from those firms. Several of the leading firms are actively engaged with the Georgia Economic Developers Association. Once potential firms have been identified, the DACC should select a firm that could serve as a valuable partner in creating an effective TAD and TIF strategy countywide.

**Lead organizations:** DACC; Columbia County Commission



## TELL THE STORY (MARKETING)

### Strategy:

Share Columbia County's story as a competitive business location with executives representing companies in the area's key industry sectors and target business sectors, site-selection consultants, and professionals with skills demanded by those sectors.

### Goal/Results:

Columbia County will begin to build an identity as a top location for expansion and relocation investments, as well as a highly desirable place for all generations of talent to live and work.

Armed with the data and information on the County's strengths provided by the **COMPETITIVE REALITIES REPORT**, Columbia County and the DACC should be more proactive and intentional in telling Columbia County's success story and serve as the chief spokesperson for the economic dynamism of the community. Site-location advisors, entrepreneurs, and companies within the targeted business sectors are the primary audience for such efforts.

The DACC is already working diligently to market Columbia County with a limited budget and staff. Examples of its efforts include conducting familiarization (FAM) tours with companies and consultants in conjunction with Masters' week, participation in certain trade show events, and a moderately effective website. Nevertheless, more can be done to enhance the County's messaging efforts and directly tie them to the opportunities in the target business sectors. Unless noted differently, all of the recommendations within this section are for the DACC as the lead organization.

### 1. Develop a unified brand for Columbia County

**Observation:** Individually, the DACC, Chamber of Commerce, Convention and Visitors Bureau, and the County government have individual logos, taglines, and messaging for external audiences. Since marketing is expensive, best practice research and experience suggest a successful destination/location marketing strategy is to generate a unified voice for investment or spending (tourism) opportunity in Columbia County. To do so, all organizations must agree to have a unified, cohesive brand that promotes the County to both internal and external audiences.

In a recent webinar focused on the positive influence tourism can have on traditional economic development activities, Atlas Advertising noted the following:

- Places leave the most lasting impressions, tangible or intangible, on human beings as individuals, whether they are deciding where a company stays or relocates or where they want to vacation.
- As information is more readily available and the competition to attract talent or visitors heightens, visitors and companies face more difficult decisions. The onset of digital and easily accessible information and data is a game-changer in how decisions are made.
- More and more, companies are seeking to locate where the workforce and talent are and visitors tend to seek options for their next vacations based on information they glean from the internet. How a community's brand attracts and retains those audiences is the destination challenge of the next 25 years.
- With a discernible and credible brand, communities can be more successful and credible in having a real dialogue about the community's assets, differentiating factors, and authentic character.

**Recommendation:** Columbia County should lead the development of an overall, unified brand identity to be used by the County and organizations involved in economic development and tourism attraction for both business development and tourism promotion to external audiences.

As such, the DACC, Chamber, CVB, and the County should engage a firm that specializes in brand development to create a unified brand for Columbia County.

**Cost:** \$50,000 for brand creation (does not include collateral development or advertising)

**Best practice examples:** Williamson County, TN; Columbus, Indiana; Virginia Beach, Virginia; Branson, Missouri; Kokomo, Indiana; Raleigh, North Carolina; Orlando, Florida.

**Lead organizations:** DACC; Chamber of Commerce; CVB; County Commission

## 2. Enhance the DACC's marketing tools and tactics in its external outreach efforts

**Observation:** While the DACC has done a phenomenal job marketing the area with limited staff and resources, with added focus and prioritization on the target business sectors suggested in these recommendations, more emphasis should be placed on fine-tuning messages and marketing to target audiences that will have a direct impact on the DACC's economic development goals. Given the wealth of information and data provided in this body of work, the DACC would benefit from an integrated plan for communications, marketing, and public relations. Doing so will strengthen the County's position for economic development, entrepreneurship, business attraction, and talent attraction to a U.S. and international audience comprised of C-level executives, site selectors, and skilled professionals.

Additionally, research and experience have shown that between 30 and 40 percent of all investment projects in the United States are facilitated by site selectors and real estate brokers. This means that the majority of investment projects emanate from companies directly. This also suggests that it is incumbent upon the DACC to have a marketing framework that touches all of these audiences.

The recommendations suggested below are aimed at addressing both audiences.



## Recommendations:

### A. Conduct in-market sales missions to Atlanta, New York, Chicago, Washington, DC, and Dallas with site-selection consultants

Direct, one-on-one meetings with site-selection consultants is one of the most effective methods to begin raising awareness about Columbia County as a potential business location, as well as to build long-term relationships with this important group. These meetings present a platform for the DACC representatives to discuss the attributes of Columbia County and the region.

Because economic development is a relationship business, this proactive effort allows the DACC to create and nurture long-term relationships with consultants. Garner Economics recommends that DACC representatives participate in missions to markets that have a high concentration of site-selection consultants, namely Atlanta, New York, Chicago, Washington, DC and Dallas.

Once the DACC is able to discern where there are other concentrations of target business sector decision makers, the markets visited can be revised and updated.

**Cost:** \$7,500 annually (currently budgeted)



### B. Execute a process for lead generation and business target profiling with the targeted companies

To jump-start the County's ability to fully utilize the business sector targets and sub-sector targets identified in Chapter 2, the DACC should engage a marketing firm to provide lead generation services that identify qualified investment opportunities. This service should yield a list of companies [including the company's current location, contact information for the C-level executive responsible for choosing future operation sites, business description (NAICS code, etc.), and magnitude of recent growth] that would be hot prospects for the DACC's recruitment efforts.

If done correctly, the lead generation identification process is methodical and evaluates key company performance metrics including sales, employment, growth, number of locations, and other relevant factors. The process tracks and evaluates "events" undertaken by companies in the identified target business sectors that indicate expansion or consolidation. Such events would include mergers and acquisitions, executive changes, or technology development. The process would also track overall industry trends. Through this evaluation of indicative corporate behavior, the lead generation firm would identify specific companies and qualified leads that are "best bets" to consider an expansion opportunity in the short- and medium-term.

Engaging a firm with a lead generation capacity will enable the DACC to conduct its marketing efforts in a focused and more direct manner. With a list of qualified leads, the DACC can focus its efforts on specific companies and concentrate broader marketing efforts in areas where there is a larger concentration of the qualified companies. The approach would be more cost effective and would focus business development efforts.

**Cost:** \$15,000–25,000

### C. “This Just In” Email Campaign

Site-selection consultants and other location advisors welcome business-related updates from economic development organizations that are informative, brief, and to the point. These communications keep them updated on developments in a given region and add to their knowledge base of a region’s available sites and overall business climate. If communicated properly, such updates also make a community “top of mind” to site-selection consultants.

The DACC should develop a communications campaign consisting of a series of e-postcards. The postcards should share relevant updates and key messages regarding the strengths and differentiating factors of Columbia County to a database of site-selection consultants and company executives identified in the lead generation activity. The tone and visual facets of the campaign should be aligned with the unified brand.

Examples of brief items to send include project announcements, new incentive programs, recent media coverage on Columbia County, and relevant rankings. These digital postcards should be short and sweet, and sent only when there is timely news to share.

**Cost:** \$5,000

### D. Create a Digital Ambassadors Program

The DACC should consider undertaking a grassroots campaign that taps the strength of its stakeholder’s online influence/presence to communicate the County’s unique story and value proposition.

Dubbed the “Columbia County Digital Ambassadors,” the program would use businesses, community leaders, entrepreneurs, Fort Gordon personnel (if permitted), and other Columbia County influencers from in and out of state to magnify the DACC’s marketing efforts. The Ambassadors would be tasked with sharing business announcements, national media placements, and other information that reflects well on Columbia County as a great place to live and work.



Because the information is being shared by an individual with a personal connection to their followers and “friends,” the content has more credibility and the message will be “stickier” than if it were sent directly from the DACC.

By researching key social media platforms (e.g., LinkedIn, Facebook, etc.) and outreach to the DACC network, the DACC can identify individuals with a passion for Columbia County and who have large online followings. Once the initial army or cadre of Digital Ambassadors has been organized, the DACC should provide guidelines and content for spreading the County’s key messages and extending its brand. Additional Digital Ambassadors should be recruited at DACC events and through social media channels.

## E. Update digital (website) and social media platforms

The importance of an economic development organization's website cannot be underestimated, especially as more C-level executives and site-selection consultants rely on a location's website as an initial screening tool. Websites have emerged as a crucial information source in location searches.

Because an economic development organization's website is often the first impression or initial source of information provided to site-selection consultants or company executives searching for new operating sites, it is crucial that the DACC's website be well-organized, easy to navigate, and attractive. Equally important, the website must be search engine optimized (SEO) and contain keywords used in business and economic development so that it appears at the top of search engine results.

Skilled professionals (talent) looking to move to Columbia County may also use the DACC's website to garner information about the County and employment opportunities therein. The DACC website should contain information (or directly link to partner organization websites that contain such information) that is also relevant to searches and research by individuals considering moving to Columbia County (e.g., employment opportunities, housing options, information on schools, neighborhoods, places of worship, etc.).

Making such improvements to the current DACC website will help it stand out in online searches and better position Columbia County compared to the numerous other communities and economic development organizations' websites that provide in-depth information to help executives in their location decisions.

To enhance the current website, the DACC should:

- **Add appealing images to capture attention, engage audiences**

A picture is worth a thousand words. It is especially important to keep this phrase in mind when designing a good website. While the DACC website has good content, it can seem somewhat burdensome to read so much text. Replacing some of the text with photos or maps that can relay the desired messages will complement the text and make the site more user-friendly.

- **Condense content, update design**

The DACC website is full of insightful and informative content. The text is practical and well written, but the site is overly text-heavy. Often, in the busy world of location advisors and corporate executives, less is more. Additionally, the site needs a comprehensive update and should be updated on a regular basis (for example, the *Chairman's message* is from a past chair and is several months old).

To improve the website, the DACC could employ more bulleted lists, charts, tables, and graphs rather than paragraphs. Information could be boiled down to concisely share the County's key messages and important takeaways that the DACC wants prospective companies or current stakeholders to remember. The [COMPETITIVE REALTIES REPORT](#) includes relevant statistics and data points that can aid in this effort.

**Cost:** \$15,000

## EXECUTE EFFECTIVELY (EFFECTIVE ECONOMIC DEVELOPMENT SERVICE DELIVERY)

### Strategy:

Build a focused economic development service delivery mechanism for existing and potential businesses in Columbia County that is aligned with the future vision for the community and the needs of the target business sectors.

### Goal/Results:

The County is better able to attract the types of industries and talent that will make Columbia County a more competitive location for business.

If the DACC and Columbia County are to enhance their roles as leaders in economic development for the County, County government and the DACC must align their mission and focus on those areas that will directly impact economic growth and create positive results.

#### 1. Develop a realistic and sustainable incentive policy for the County

**Observation:** Because there is not a sustainable funding source for economic development, current incentives in Columbia County are financed through the general fund of the County's budget.

As noted by the County government representatives and private sector stakeholders representing the real-estate development community, the

County has few local incentive offerings and those that do exist are unstructured. The result is that the available packages are also unpredictable.

Though being adaptive and flexible in incentive offerings has merit, most (not all) companies, consultants, and developers would prefer to see a uniform incentive structure based on the value of the capital investment, jobs created, and total economic impact on the community. In short, the investor would like to know the ground rules for incentive packages up front. For most job and capital intensive projects of merit, a community's incentive offerings will be one of the first pieces of information requested by the company or site-selection advisor.

**Recommendation:** To properly and more accurately set expectations for companies considering investment in Columbia County, the County/DACC should catalog all local incentives available to new and existing business and the eligibility criteria for each.

Moreover, a uniform incentive policy that incorporates those policies and procedures should be developed. The level of incentives should be calibrated to the projected economic impact of the project and the projected return on investment to the community. The DACC and County government should post the information on the resulting policy on an easily accessible page on their websites.

**Best practice example:** Wichita and Sedgwick County, Kansas  
[http://www.sedgwickParish.org/finance/incentive\\_policy.asp](http://www.sedgwickParish.org/finance/incentive_policy.asp)

**Lead organizations:** Columbia County Commission; DACC



## 2. Create a Project Opportunity Fund (deal closing fund)

**Observation:** Having a local deal closing fund is a differentiator as it relates to attracting or retaining business investment. Most proactive municipalities in the United States have some form of a discretionary fund used to win an investment, based on a set of investment guidelines related to jobs, capital investment, targeted business sectors, and other criteria. Columbia County is weak in this offering.

**Recommendation:** The County government should set aside funds that can be carried forward to subsequent fiscal years if not used, as a deal closing fund. Ideally, the state of Texas' model of employing a half-cent sales tax to finance the fund would be a transformative tool. Because state policymakers currently do not support this type of sustainable funding for individual counties or municipalities, Columbia County government should allocate resources every year in its general budget as a short-term solution to create a deal closing fund.

With such a closing fund, Columbia County can grow its economy in the way County policymakers desire and could build the appropriate infrastructure to support such growth.

### Best practice examples:

- State of Texas  
<https://www.comptroller.texas.gov/economy/local/type-ab/index.php>
- Shawnee County, Kansas  
<http://www.jedoecodevo.com/About/>

**Lead organization:** Columbia County Commission; DACC

## 3. Conduct a capital campaign feasibility analysis for the DACC to attract private dollars

**Observation:** Currently, 100 percent of the DACC budget is derived from public funds, with supplemental funds from IRB fees and contributions from the SRS Community Reuse Organization (SRSCRO). Its typical annual income from public sources is \$375,000. This is woefully low compared to benchmarks and does not allow the County and Authority to be as effective and proactive in its economic development efforts as they could be.



The most successful economic development programs throughout the United States are well-funded, true public-private partnerships with funding from both sectors. The efforts are also led by the private sector.

**Recommendation:** The DACC should engage outside counsel to conduct a feasibility analysis to test the concept of transforming the DACC into a public-private partnership and to explore the level of support within Columbia County's private sector to provide sustainable funding for such efforts.

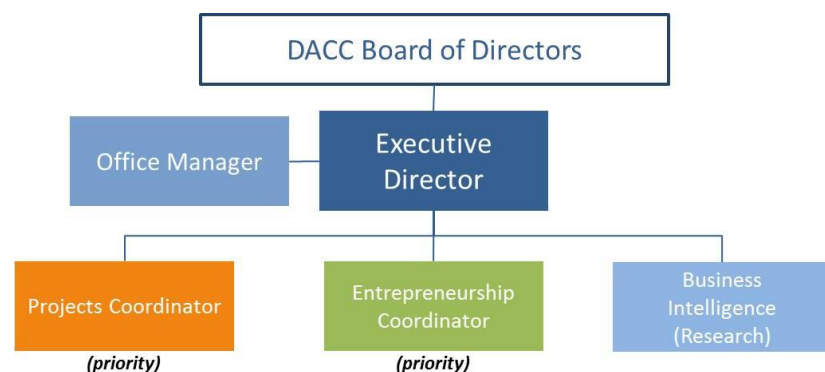
**Cost:** \$25,000 for the feasibility analysis

#### 4. Reorganize the DACC to effectively seize on current and future economic opportunities and create an advisory board of directors

**Observation:** The DACC has a staff of 2.5 FTEs and an annual county appropriation of \$316,751 (for FY '16-17). This budget and staffing are below the norms of other best practice economic development organizations, especially given the County's population and the economic development service demands, if the DACC is to serve as a catalyst to help grow the County's economic base. For example, a community the size of Columbia County with a population of 145,000 residents would typically see a countywide economic development budget in the \$850,000 range and a full time staff of four to five.

**Recommendation:** The DACC should suggest a reorganization strategy to the policymakers and the funding agency of the Authority that better aligns the DACC work with its economic development goals. The reorganization should reflect three key objectives: (1) enhance the DACC's organizational efficiency, (2) position the DACC to effectively implement the Commissioners' goals and objectives for the County and the County's Comprehensive Plan and, (3) have the resources to implement this economic development strategy to attract business sectors targets and grow entrepreneurship in the County. The suggested organization chart is illustrated in Figure 16.

**FIGURE 16: SUGGESTED REORGANIZATIONAL STRUCTURE**

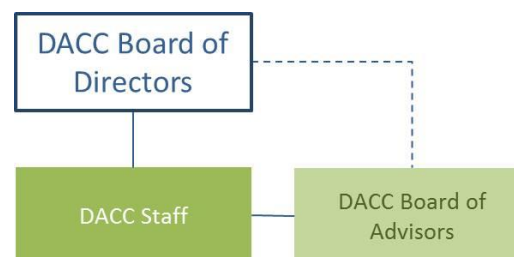


Additionally, so that the DACC is able to consider various sides of an economic development issue and/or growth perspective (especially if a capital campaign from the private sector is successful), the Authority should appoint representatives from the list of contributing companies or organizations to serve on an **Advisory Board**. The Advisory Board further extends the outreach on policies and issues from a diverse set of engaged constituents and would serve as additional feedback to both the Authority and the Board of Commissioners. Because the representatives are more closely engaged in the work of the DACC, their company will likely be more supportive of the work and provide the necessary buy-in for the initiatives' success.

Additional ex-officio members of the Advisory Board should include academia, certain not-for-profits, and military (Fort Gordon) representatives that have a stake in the economic prosperity of the County. The proposed relationship among the DACC Board, the DACC Staff, and the Advisory Board is shown in Figure 17.

The role of the Board of Advisors will be to provide input and feedback on DACC programs, policies, and initiatives, as well as feedback or recommendations to the Board of Commissioners as they relate to policy issues affecting economic development.

**FIGURE 17: DACC ADVISORY BOARD**





## CHAPTER 4: CONCLUSION



With its strong sense of commerce, community, and the key role it plays in supporting efforts that will guide and deliver national security, Columbia County has much potential to position itself as a competitive place for business on the global stage.

This *Harnessing Opportunities and Talent: An Economic Development Strategy for Columbia County* provides a roadmap for County leaders to raise the bar in its economic development efforts. It provides recommendations for long-term structural investments to ensure that Columbia County can better leverage its assets and leverage its proximity to the game-changing trends and technology developments taking place at Fort Gordon. The Strategy also calls on the County leadership to take on catalytic initiatives to strengthen the community's product inventory. Such strategic steps will help Columbia County differentiate itself and attract the target business sectors and support the emerging cyber industry in the area.

To better accommodate and support the County's trajectory for continued growth, the County's economic development leadership will need to be proactive and execute its economic development efforts differently. It will need to be a champion for long-term investments that will add to the County's product and quality of place, as well as ensure that sufficient resources are available to fund such goals.

Coupled with this change, the DACC and County government will need to be more outward-facing in its marketing and attraction effort. In addition to targeting the optimal business sectors noted earlier in this report, the County must continue to work with other economic development partners, the private sector, and stakeholders to create and encourage the development of the spaces and places where such activity will occur.

The end result of undertaking the strategy presented in *Harnessing Opportunities and Talent: An Economic Development Strategy for Columbia County* will be to greatly improve the County's attractiveness as a location for business and talent.

The status quo is not an option. By taking on actionable and measurable plans to focus its entrepreneurial, retention, and attraction efforts, the DACC can help Columbia County become more competitive. With added focus, the County can make huge strides in its economic development efforts and build the community it desires.

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Garner Economics would like to thank the DACC staff, the Authority board of directors, the focus group participants, and the residents who took the time to complete the electronic survey. The staff's feedback, compilation of data, information, and openness and willingness to explore various opportunities to strengthen operations have contributed to the richness and rigor of this enhancement strategy.

## RECOMMENDATIONS SUMMARY

Working to implement *Harnessing Opportunities and Talent: An Economic Development Strategy for Columbia County* will be a critical component to the area's future success. By taking proactive action to leverage current assets and proactively set its own economic future, the DACC and the County can provide economic opportunities for its

residents, businesses, and future residents. The following is a summary of the recommendations offered in this strategy. (These were developed given the analysis and assessment taken during the first two phases of the project.) This strategy is a five-year plan (2017–2022), and the schedule noted below was created to reflect a five-year timeline.

Strategy	Description	Actions	Timeline
Enhance the Product	Product improvement initiatives to ensure Columbia County is in a competitive position to attract, retain, and grow the types of companies and industries it desires	1. Create a culture, programs, and support infrastructure for entrepreneurship in Columbia County	2017–2022
		2. Create a plan to improve gateways into the County—including new signage, landscaping, and beautification initiatives	2017–2018
		3. Develop a real estate portfolio of additional sites for manufacturing and office development	2017–2020
		4. Develop an office/R&D park near one of Fort Gordon's entrances and joint venture with the private sector to create Sensitive Compartmented Information Facility speculative building (SCIF) space	2018–2020
		5. Create a long-term TIF and TAD financing strategy to help fund public infrastructure and private development related to the targeted business sectors	2018
Tell the Story	Product marketing actions for Columbia County to share the economic dynamism of the County with target prospects and talent	1. Develop a Columbia County unified brand	2017
		2. Enhance the DACC's marketing tools and tactics in its external outreach efforts	2017–2022
		A. Conduct in-market missions to Atlanta, New York, Chicago, and Dallas with site-selection consultants	2017–2022
		B. Execute a process for lead generation and business target profiling with the targeted companies	2018–2022
		C. "This Just In" Email Campaign	2017–2022
		D. Create a Digital Ambassadors Program	2017
		E. Update digital and social media platforms	2017-2018

Strategy	Description	Actions	Timeline
Execute Effectively	Organizational adjustments that allow the County or the DACC to align its mission and focus on those areas that will directly impact the economic growth the community desires	1. Develop a realistic and sustainable incentive policy for the County	2017
		2. Create a Project Opportunity Fund (deal closing fund)	2018–2019
		3. Conduct a capital campaign feasibility analysis for the DACC	2018
		4. Reorganize the DACC to effectively seize on current and future economic opportunities and create an advisory board of directors	2018-2019