



Macon-Bibb County Industrial Authority Strategic Plan

PREPARED BY VISIONFIRST ADVISORS

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Introduction & Project Overview

The Macon-Bibb County Industrial Authority (MBCIA) has been an essential component of the economic development success of the region for decades. The Georgia General Assembly authorized the creation of MBCIA providing its capacities to support recruitment and expansion of industrial and commercial businesses. Today, the authority structure serves as a competitive advantage for Macon-Bibb County and will continue to do so in the future.

VisionFirst Advisors is proud to have been selected to partner with MBCIA to develop its next five-year strategic plan. Given today's economic uncertainty triggered by the COVID-19 pandemic, it is wise for the organization to evaluate the current situation and craft a plan for moving forward.

The plan includes tactics to improve organization performance, enhance the region's available product (sites and buildings), understand competitive strengths, build trust with area stakeholders and create a culture of collaboration throughout all aspects of economic development - and this plan provides a pathway to accomplish just that.

In addition, it is important to communicate the magnitude of ongoing oversight and management responsibility of MBCIA. It is not just an economic development marketing organization but a manager of real estate and public assets critical to the competitiveness of the county. In fact, MBCIA manages more than 80 properties valued at \$40 million¹.

Having a public authority is a great advantage in recruitment of new businesses, rehabbing distressed properties through the Macon Bright Program and supporting other real estate transactions associated with private capital investment and jobs. Through collaboration, these efforts can be combined with other entities in the community to produce a holistic approach to economic development fostering an environment for economic prosperity for all the citizens.

Project Overview

To develop a meaningful and implementable strategic plan, which the community can successfully implement, it was important to not only gather data and trends, but to seek stakeholder input from a variety of voices, providing context to the analytics.

VisionFirst Advisor's project approach included:

- Gathering feedback through conversations with numerous community leaders, business leaders and staff regarding the community's current economic development efforts and suggestions for moving forward.

¹ MBCIA Audit

- Conducting a digital online survey of residents.
- Analyzing data trends and projections regarding the county's growth, gaps and opportunities as compared to the region, state and nation.
- Evaluating the county's target industries as well as incentive structure.
- Assessing the county's assets both tangible and intangible.
- Developing a suite of goals and strategies for the county to use for increased economic prosperity.

Based on interviews along with desktop analysis and VisionFirst's knowledge of the region and the organization, the following pages outline a strategic plan that identifies foundational activities, outlines goals and provides suggested tactics for MBCIA to implement on a path to long-term success.



First Impressions

Communities experience difficulties seeing their surroundings as clients, guests, prospective industries and newcomers to the area see them. The information below outlines first impressions as perceived by a site selector.



ROOM TO TOUT ADVANTAGES

Macon-Bibb is known for a number of assets – private universities, colleges proximity to a major military installation and home to a robust portfolio of existing employers. However, in researching the community and traveling to the county, negative images are some of the first impressions. Blighted community entrances and media stories focused on crime are shaping the community's image before a prospect has the chance to meet with officials, existing employers or economic developers. There is an opportunity for MBCIA to inform perceptions through a stronger marketing and communication effort that touts advantages and initiatives.



CONFUSION AROUND WORKFORCE

Almost every interview the discussion of who “owns” workforce was discussed. Workforce development and retention is not a one organization initiative. For the community to be truly successful, all education and workforce partners must work together to achieve meaningful and measurable success. Specifically, in economic development, the Industrial Authority must be on the frontlines in working with prospective companies and existing industry on any workforce needs but those needs should be shared with community partners to find solutions and retain/attract industry.



NOTABLE HIGH-WAGE WINS

Although the organization has faced recent public scrutiny related to past leadership, MBCIA has been responsible for building a sizeable existing industry sector and continues to prove to be a competitive location in the state according to officials. With its success in expanding and attracting industry, MBCIA should promote its overall impact to the local economy - especially the high-wage jobs local companies provide and are continuing to create for residents.

Stakeholder Feedback

In Your Words - VisionFirst hosted nearly 20 stakeholder meetings over several days with elected officials, existing business leaders, small businesses and community members.



Conversations with the professional staff members allowed VisionFirst to gain a better understanding of current operations, programs, products and services. These conversations also helped identify challenges faced due to macro-economic trends and local issues especially as the nation and community begin to recover and reopen from the COVID-19 pandemic.

Meetings with business and community stakeholders allowed VisionFirst to gain insights through the lens of each groups' focus and how the Industrial Authority and its partners can find long-term success. Every stakeholder meeting produced productive dialogue about the county's future, identifying both critical issues and attainable opportunities. During the conversations, VisionFirst sought answers to questions centered on such topics as:

- What is the definition of economic development for Macon-Bibb County?
- Who is the Industrial Authority's internal and external customers?
- What are the barriers to success?
- Who are the partners for the county's economic development efforts?
- What belongs to the Industrial Authority?
- What does success look like for the Industrial Authority and economic development overall?
- How will the organization measure success?

Key findings from the meetings are presented in aggregate on the following pages and have been grouped by the main themes that resulted from the stakeholder conversations. Although the meetings focused on the Industrial Authority and its role in leading local economic development, the discussion also covered the needs in the broader community.

The comments listed are a sampling of the meeting outcomes from local leaders and do not reflect VisionFirst's opinion.

CONTINUE TO DEMONSTRATE TRANSPARENCY & ACCOUNTABILITY

- The county has been successful in recruiting business but now is the time to show the economic impact of investments and what are the returns in the long-term.
- There is a need to explain the project process, so stakeholders understand MBCIA's role.
- While there has been great success in luring business to the county, there is a need to demonstrate that MBCIA is competing for higher-wage jobs to increase the standard of living for residents.

DEFINE & MEASURE TALENT & WORKFORCE EFFORTS

- Nearly every interview discussed who "owns" workforce development at a county level.
- Workforce is not defined by a single issue and there is room for each organization to contribute to workforce and education success.
- Key to successful workforce and education efforts will be defining activities and measuring success.

POSITION MACON-BIBB COUNTY AS A REGIONAL HUB

- With more than 20,000 regional residents coming into the county to work, MBCIA has the opportunity to increase its position as a regional employment hub.
- There is opportunity for increased project coordination through the Central Georgia Joint Development Authority.
- MBCIA should continue to coordinate with Robins Air Force Base to utilize exiting military and trailing spouses.
- The county's limited available land but ample water supply further demonstrates the need for regional project coordination.
- The county's airports represent untapped opportunities for further development.
- There are innovative partnership opportunities for land development – especially with counties who have interstate access.

INCREASE MARKETING & COMMUNICATIONS EFFORTS

- With COVID-19 there is a need for increased marketing and communications efforts surrounding the county's assets and the organization's successes.
- With 81 sites already managed by MBCIA and through joint efforts with Georgia Power, the Industrial Authority must strengthen its sites and buildings database and marketing.
- Many of the county and the region's assets are going unnoticed to prospects who are making judgements off of online media stories and sites.

LEVERAGE ENTREPRENEURIAL ASSETS

- Macon-Bibb is fortunate to have two top private universities in the county with a host of students and faculty with an entrepreneurial mindset.

- NewTown Macon is an untapped asset that needs to be highlighted in all recruitment efforts.
- The county's strong entrepreneurial program, young professionals living in downtown, Mercer's Innovation Center and the military personnel in the region all offer opportunities to increase the number of start-ups in the area.

ADVOCATE FOR COMMUNITY NEEDS

- While not in the purview of the Industrial Authority, it should advocate for community development improvements including beautifying entranceways and downtown redevelopment.
- As an advocate for business, the Industrial Authority should work with elected leadership to minimize hurdles to start or relocate a business in the county.
- The community's poverty rate is significant, and the Industrial Authority should utilize its efforts to increase per capita wage and income.



Community Survey

Beyond key stakeholders in the economic development process, it was important to provide a mechanism for interested community members to give input. Resident input is essential for not only the development of the strategic plan but to build a base of understanding and support to accomplish the goals which are laid out. Community feedback provides what perceptions around the strategic plan process exist, what type of growth and industry is wanted, residents' thoughts about the county's future and how they feel about the quality of life they currently enjoy. To that end, VisionFirst Advisors, along with MBCIA sought public input through an online survey completed by nearly 200 people. Below are the results of the survey.

The respondents' demographics included:

- Nearly 80% have a bachelor's degree or higher.
- More than 72% are over the age of 45.
- More than 53% have lived in the community for more than 10 years while another 28% have lived in Macon their entire life.

Employment sectors of the respondents were diverse with the following breakdown:

Government employee (municipal, county, state, federal)	18.24%
Private business owner	18.82%
Private business employee	27.65%
Non-profit/community organization employee	15.88%
Retired	16.47%
Not currently employed	2.94%

Question 1: Please rank in order of importance, 1-6 (with 1 be the most important), the Industrial Authority's programs and initiatives.

Recruitment of new businesses	39.77%
Diversify the employment base and create new higher-paying jobs	22.81%
Facilitate the expansion and retention of existing industries	19.88%
Increased private capital investment and local tax revenue	5.26%
Attraction and retention of talent	7.60%
Identify sites regionally for businesses to locate to the area	4.68%

Question 2: From an economic development standpoint, where would you like to see the Macon-Bibb County in five years? (Check the top three)

A diverse range of job opportunities that offer upward mobility	71.35%
Home to multiple industry sectors	39.77%
Increase per capita income	47.95%
Supportive of start-ups, small business and entrepreneurs	33.92%
A community with a vibrant downtown and neighborhoods that appeal to a diverse mix of residents	38.60%
A community that offers high-achieving educational options from Pre-K and technical college level through four-year universities	44.44%

Question 3: To what extent do you agree or disagree with the statement about your county/regional economy? (Agree, Neutral, Disagree)

	Disagree	Neutral	Agree
All residents have equal access to economic opportunity	50.29%	18.71%	30.99%
Wages and salaries make it possible to maintain and improve my standard of living	25.73%	23.39%	50.88%
Education and job training are available to residents who want or need it	15.79%	23.98%	60.23%
Entrepreneurs can start and succeed	14.62%	44.44%	40.94%
The community attracts businesses or is seen as a business destination	46.20%	35.67%	18.13%
The overall mix of employers (manufacturing, professional, retail business, etc.) is diverse and robust	44.44%	33.92%	21.64%
Local government, organizations and businesses cooperate on community and economic development initiatives	36.84%	35.67%	27.49%

Question 4: What are Macon-Bibb County's best assets and biggest challenges as it relates to economic development?

	Challenge	No Opinion	Asset
Affordability	18.13%	12.87%	69.01%
Ease of doing business/regulatory environment	47.37%	31.58%	21.05%
Available sites/buildings for new industry or expansions	21.05%	14.04%	64.91%
Workforce skills and availability	66.08%	14.62%	19.30%
Workforce costs	20.47%	33.92%	45.61%
Access to quality healthcare	16.96%	11.70%	71.35%
Proximity to Military Assets	2.92%	11.70%	85.38%
Access and affordability of high-speed internet for home and business	36.26%	18.13%	45.61%
Quality of life amenities	33.33%	21.64%	45.03%

Tax environment	38.60%	29.24%	32.16%
Connectivity – location, traffic and roadways	16.37%	13.45%	70.18%
Support for existing industry growth and expansion	23.98%	34.50%	41.52%
Technical support of entrepreneurs & small biz	32.75%	43.86%	23.39%
Education (public and private)	52.63%	10.53%	36.84%
Opportunities for higher education including technical training	10.53%	12.87%	76.61%
Crime and personal safety	82.46%	15.20%	2.34%
Housing options (rental and home ownership)	35.67%	22.81%	41.52%
Organized community and business leadership	42.11%	29.24%	28.65%
A shared vision of where the county is going	60.23%	26.32%	13.45%

Question 5: What types of new business and industry do you want to see in the region? (Check all that apply.)

Advanced manufacturing	81.29%
Aviation and aerospace	71.35%
Food processing	30.41%
Distribution, warehousing and logistics	62.57%
Financial and professional services	52.63%
Home-grown/local entrepreneurial businesses	67.25%
Retail	32.75%
None, I prefer to keep the existing level of business and industry	1.75%

Question 6: What is your biggest concern facing Macon-Bibb's economy as a result of COVID? (Check all that apply.)

Local loss of revenue	65.50%
Unemployment	59.65%
Greater socioeconomic disparities	55.56%
Loss of existing industry both large and small	30.41%
Population loss	16.37%
Human service needs	42.69%
K-12 education/increased educational disparity	62.57%

Question 7: What do you believe is the biggest challenge to retaining and attracting talent?

Lack of jobs with upward mobility	48.54%
Lack of understanding of the resources available to start a new business	6.43%
Unaware of the educational opportunities to support job growth	9.94%
Inability to engage in leadership positions within the region	8.19%
Lack of awareness of what the region has to offer	26.90%

Data-At-A-Glance

When evaluating a community either for strategic plans, communications or site selection, VisionFirst Advisors conducts a high-level data analysis of the county and region. Emphasis is placed on labor force participation rates, educational attainment, talent pipeline, industry location quotients and leading industries. This data provides a baseline of information to educate and inform decisions and better position the community. VisionFirst compiled data from numerous trusted state and national sources.

FIGURE 1: COMMUNITY MARKETING & POSITIONING²

Data 2020 Q2 (<i>Historic 2015</i>)	BIBB COUNTY	MACON-BIBB MSA	GEORGIA	USA
Population	153,490 (154,816)	229,676 (231,517)	10,297,484 (10,006,693)	322,903,030 (316,515,021)
Median Age	36.2 (35.6)	38.3 (37.6)	36.5 (36.9)	37.9 (37.6)
Population Annual Average Growth	-0.1%	-0.1%	1.0%	0.7%
People per Square Mile	613.2	133.5	184.6	92.9
Unemployed	8.80% (6.2%)	8.50% (6.1%)	6.40% (5.5%)	5.9% (5.0)
Labor Force Participation Rate (civilian population 16 years & over)	56.8% (57.3%)	56.0% (56.5%)	62.8% (62.7%)	63.2% (63.5%)
Prime-Age Labor Force Participation Rate (civilian population 25-54)	76.2% (76.7%)	76.4% (76.6%)	80.5% (79.7%)	81.8% (81.5%)
Veterans, Age 18-64	5.7% (6.6%)	5.9% (6.26%)	5.9% (6.6%)	4.7% (5.5%)
Median Household Income	\$39,931 (\$36,519)	\$43,093 (\$39,845)	\$55,679 (\$49,620)	\$60,293 (\$53,889)
Per Capita Income	\$24,409	\$25,423	\$29,523	\$32,621
Cost of Living	89.7%	90.4%	95.4%	100.0%
Mean Commute Time (minutes)	21.2 (20.7)	23.4 (22.9)	28.4 (27.4)	26.6 (25.9)
No High School Diploma	11.5% (14.3%)	12.1% (14.6%)	12.0% (12.9%)	11.2% (11.8%)
High School Graduate	31.2% (31.8%)	32.6% (33.2%)	26.7% (27.3%)	25.8% (26.4%)
Some College, No Degree	23.2% (22.9%)	23.0% (22.7%)	21.1% (21.7%)	21.0% (21.7%)
Associate Degree or Higher	34.1% (30.9%)	32.4% (29.6%)	40.2% (38.0%)	42.0% (40.1%)
Spending Per Pupil	\$9,953	\$10,138	\$10,274	\$12,258
Median House Value (of owner-occupied units)	\$116,500 (\$118,700)	\$120,527 (\$120,172)	\$166,800 (\$148,100)	\$204,900 (\$178,600)

² JobsEQ Q2 2020

Rental Vacancy	8.6% (11.9%)	7.8% (10.9%)	7.0% (8.7%)	6.0% (6.4%)
Renter-Occupied Housing Units (% of Occupied Units)	47.4% (47.0%)	38.7% (38.7%)	36.9% (36.7%)	36.2% (36.1%)
Poverty Level	25.7% (27.4%)	22.6% (21.1%)	16.0% (18.4%)	14.1% (15.5%)
Foreign Born	3.2% (3.7%)	2.7% (2.8%)	10.1% (9.8%)	13.5% (13.2%)
Private Sector Union Rate	1.00%	1.00%	2.80%	6.2%
Manufacturing Union Rate	1.30%	1.30%	4.00%	8.4%

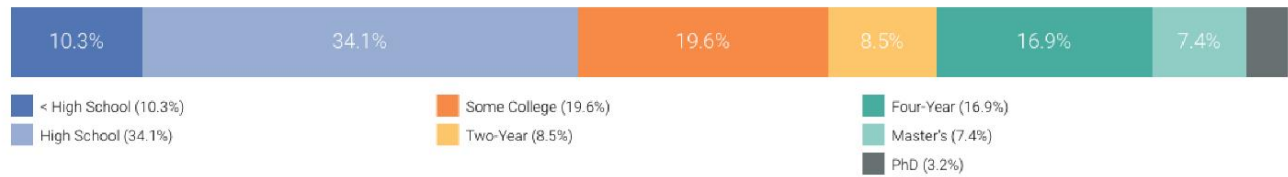
In looking at the data from Figure 1, there are several data points worth noting in positioning the county for competitive economic development projects:

- The county has younger average age which appeals to attracting new professionals and families.
- The labor force participation rates for both over 16 and prime age are lower than the state and nation but by showcasing employer and educational testimonials any negativity can be mitigated.
- The median household income is lower than the MSA, state and nation which correlates to the educational attainment with more than 65% population without an Associate degree or higher. Data both prior and during the pandemic have noted those with a bachelor's degree have lower unemployment than those with only a high school diploma.
- The private sector and manufacturing union rates are significantly lower than the state and the nation. With the potential for additional manufacturing expansion as a result of the pandemic, those numbers will be attractive to prospects.
- In addition, the mean commute time of 21.2 minutes demonstrates a willingness to travel and offer opportunities for regional projects. To demonstrate commute times more accurately for higher paying jobs, rely on industry partners to provide employees zip code information for specific occupations – which will likely highlight a more robust distance traveled in the region.

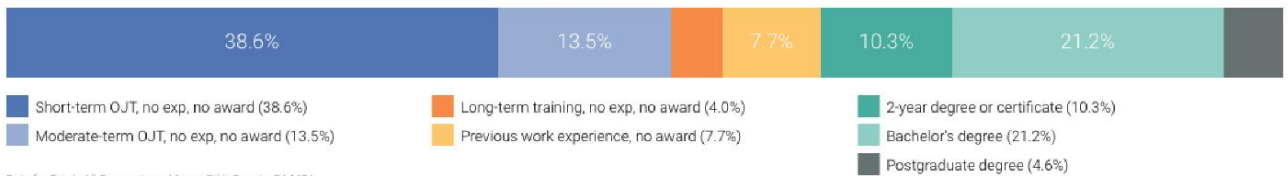
Workforce & Industry Alignment »

FIGURE 2: EDUCATION ATTAINMENT COMPARED TO TRAINING REQUIRED³

Educational Attainment :



Education and Training Requirements :



Data for Total - All Occupations, Macon-Bibb County, GA MSA
Source: JobsEQ®, Data as of 2020Q2

Macon-Bibb's **Current Labor Force Educational Attainment versus Current Industry Education and Training Requirements** show 43.8% of the jobs in the MSA require a two-year certificate/degree or higher, compared to 36% of the population having a two-year certificate/degree or higher. This is a disadvantage for the organization when trying to expand and attract higher skilled jobs – highlighting a portion of the pipeline with skilled workers to meet current and future workforce needs. However, for employers seeking employees with some college or higher, 55.6% of the residents meet that criteria, as compared to employers only requiring 47.8% of the same education and training.

Examining the region further, occupational growth rates are expected to decline overall. There are a number of reasons for occupation mix to decline or increase:

- **Technology and production methods:** The introduction of new tools, automation and technology can reduce or replace workers. Advanced technology brings about new and often higher-paying jobs to individuals with more technical skills.
- **Outsourcing and organization:** As companies grow or restructure, contract workers often fill particular occupations, reducing or limiting employment growth within a company.
- **Replacing services or products:** Consumer preferences change for products and services over time and impact specific occupations.

However, workers exiting from the labor force and occupational transfers across industry sectors reveal jobs that will need to be filled over the next five years. The total demand forecast is based on the sum of projected employment growth and projected separations

³ JobsEQ

from the workforce. The separations are the sum of labor force exits and the occupational transfers; however, this does not reflect the demand.

Further examination into the potential occupation gaps (Figure 3), which is based on comparing occupation demand growth and projected educational attainment from residents, reveals the potential for supply shortfalls or saturation in the workforce or the annual supply gap. With automation and technology saturating many industries, the region needs to prepare for this wave of change and upskill residents to meet future needs.

- When the region, for example, has an occupation expected to grow quickly but the educational requirements for the occupations does not match well with the education attainment of residents, there is a high potential for **occupation shortfalls**.
- Slow-growing or contracting occupations due to automation or technology represent potential **saturation** in the market.

In noting these surpluses and gaps, coordinate with employers and education providers before layoffs to mitigate any negative employment impacts. Workers often do not know about training opportunities or cannot afford to take time off. However, if training is conducted on site and in partnership with the employer then reskilling is more attainable and provides more long-term benefits.

FIGURE 3: POTENTIAL ANNUAL OCCUPATION GAPS OVER 10 YEARS IN MACON-BIBB MSA

SOC	Occupation	Annual Gap or Surplus	Current Employment Q2 2020	Total Annual Demand	Projected Employment 2030
29-0000	Healthcare Practitioners & Technical	-96	8,206	731	8,653
11-0000	Management	-47	6,166	683	6,239
13-0000	Business & Financial Operations	-24	6,804	760	6,525
15-0000	Computer & Mathematical	-18	2,389	221	2,428
31-0000	Healthcare Support	-15	4,951	979	5,611
25-0000	Educational Instruction & Library	-12	5,838	722	5,675
49-0000	Installation, Maintenance, & Repair	-12	4,192	523	4,097
47-0000	Construction & Extraction	-12	3,650	552	3,825
21-0000	Community & Social Service	-8	1,819	274	1,915
17-0000	Architecture & Engineering	-5	893	88	876
27-0000	Arts, Design, Entertainment, Sports, & Media	-4	1,394	200	1,356
19-0000	Life, Physical, & Social Science	-4	611	72	624
23-0000	Legal	-3	1,067	98	1,072
33-0000	Protective Service	-2	2,871	371	2,792
37-0000	Building, Grounds Cleaning & Maintenance	3	4,240	796	4,299
45-0000	Farming, Fishing, & Forestry	4	423	78	389
39-0000	Personal Care & Service	11	2,672	576	2,720
53-0000	Transportation & Material Moving	19	9,371	1,591	9,308
51-0000	Production	23	4,859	653	4,307
43-0000	Office & Administrative Support	40	13,914	2,029	12,616
41-0000	Sales & Related	68	10,247	1,880	9,608
35-0000	Food Preparation & Serving Related	94	8,964	2,269	9,403

Military Exits »

FIGURE 4: MILITARY EXITS MACON-BIBB 45 MINUTE REGION⁴

Military exits data are from the Department of Defense and for the fiscal year 2016. Occupation growth demand data are estimated via custom forecasts as well as current industry employment data and the Chmura Industry/Occupation. Industry employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and currently updated through Q4 2019 with preliminary estimates by Chmura updated to Q2 2020.

SOC Code	Occupation	Annual Military Exits	Annual Demand <i>(Growth and Separations)</i>
99-9999	Unknown	317	0
55-3016	Infantry	57	0
53-7065	Stockers & Order Fillers	27	427
55-3014	Artillery & Missile Crew Members	17	0
53-3032	Heavy & Tractor-Trailer Truck Drivers	16	353
49-3023	Automotive Service Technicians & Mechanics	14	122
49-3011	Aircraft Mechanics & Service Technicians	14	32
53-7072	Pump Operators, Except Wellhead Pumpers	12	1
55-3013	Armored Assault Vehicle Crew Members	11	0
43-2099	Communications Equipment Operators, All Other	10	1
43-4161	HR Assts, Except Payroll & Timekeeping	10	22
35-2012	Cooks, Institution & Cafeteria	9	94
15-1299	Computer Occupations, All Other	8	126
49-2021	Radio, Cell Tower Equipment Installers & Repairers	8	1
33-3051	Police & Sheriff's Patrol Officers	7	114
51-8031	Water, Wastewater Treatment Plant & System Operators	7	18
29-2042	Emergency Medical Technicians	7	21
27-3091	Interpreters & Translators	6	9
55-3019	Military Enlisted Tactical Operations & Air/Weapons Specialists & Crew Members, All Other	4	0
49-3042	Mobile Heavy Equipment Mechanics, Except Engines	4	28
17-1021	Cartographers & Photogrammetrists	4	1
55-1015	Command & Control Center Officers	3	0
43-5011	Cargo & Freight Agents	3	8
49-3031	Bus & Truck Mechanics & Diesel Engine Specialists	3	40

⁴ JobsEQ

33-2011	Firefighters	3	57
49-2094	Electrical & Electronics Repairers, Commercial & Industrial Equipment	3	15
17-3024	Electro-Mechanical & Mechatronics Technologists & Technicians	3	2
49-1011	First-Line Supervisors of Mechanics, Installers Repairers	3	84
13-1081	Logisticians	3	48
43-9061	Office Clerks, General	3	435
29-2043	Paramedics	3	14
43-5071	Shipping, Receiving & Inventory Clerks	3	119
49-2022	Telecommunications Equipment Installers & Repairers, Except Line Installers	2	20
23-2011	Paralegals & Legal Assistants	2	57
53-7199	Material Moving Workers, All Other	2	5
29-2098	Medical Dosimetrists, Medical Records Specialists, & Health Technologists & Technicians, All Other	2	48
29-2061	Licensed Practical & Licensed Vocational Nurses	2	160
55-2012	First-Line Supervisors of Weapons Specialists/Crew Members	2	0
47-5097	Earth Drillers, Except Oil & Gas; & Explosives Workers, Ordnance Handling Experts, & Blasters	2	5
13-1071	Human Resources Specialists	2	128
47-1011	First-Line Supervisors of Construction Trades & Extraction Workers	2	85
31-9091	Dental Assistants	2	63
45-2011	Agricultural Inspectors	2	12
49-2091	Avionics Technicians	2	5
43-3031	Bookkeeping, Accounting, & Auditing Clerks	2	193
55-1014	Artillery & Missile Officers	2	0
53-2021	Air Traffic Controllers	1	9
53-2022	Airfield Operations Specialists	1	2
27-4031	Camera Operators, Television, Video, & Film	1	2
55-3015	Command & Control Center Specialists	1	0
47-4099	Construction & Related Workers, All Other	1	4
33-3021	Detectives & Criminal Investigators	1	35
33-3012	Correctional Officers & Jailers	1	140
39-9098	Crematory Operators & Personal Care & Service Workers, All Other	1	14
11-3121	Human Resources Managers	1	23

49-9021	Heating, Air Conditioning, & Refrigeration Mechanics & Installers	1	56
53-1047	First-Line Supervisors of Transportation & Material Moving Workers, Except Aircraft Cargo Handling Supervisors	1	87
15-1244	Network & Computer Systems Administrators	1	29
19-5011	Occupational Health & Safety Specialists	1	8
49-9069	Precision Instrument & Equipt Repairers, All Other	1	2
43-5061	Production, Planning, & Expediting Clerks	1	52
29-2034	Radiologic Technologists & Technicians	1	25
11-3061	Purchasing Managers	1	10
49-9052	Telecommunications Line Installers & Repairers	1	10
31-9096	Vet Assistants & Lab Animal Caretakers	1	24
55-1017	Special Forces Officers	1	0
29-2055	Surgical Technologists	1	19
	Total	651	3,527

An Untapped Workforce: Exiting Military

Macon-Bibb is fortunate to be in the same region as Robins Air Force Base. According to data from JobsEQ (Figure 4), there are more than 650 annual military exits - representing a possible untapped workforce for the region. According to a report by iCIMS a talent cloud company, 74% of post-9/11 veterans believe it takes them longer to find a job than a non-veteran with the same level of work experience. Moreover, 41% of post-9/11 veterans believe hiring managers do not understand their military experience and 36% believe job postings require more specialized experience than they have.

Employers often have difficulty understanding military experience and how those skills can benefit a company. The Upstate Business Journal noted, “while 85% of military occupations have a direct civilian equivalent, the other 15% also have transferable and highly sought-after skills. Even when companies recruit and hire veterans, they are failing to make the most of those veterans’ talents and experiences, which contributes to underemployment, high levels of frustration, and even boredom.”

Employers throughout the region and the nation are in search of reliable employees. Hiring veterans often provides the soft skills so many employers are looking for – effective communicators, the ability to work in a team and leadership skills. MBCIA has the opportunity to work with both its top employers and base officials to better retain exiting military in local jobs.

Commuting Patterns »

FIGURE 5: RESIDENTS OF BIBB COUNTY, GEORGIA AND WHERE THEY WORK

FIPS	Region	Commuters
13021	Bibb County, Georgia	53,274
13121	Fulton County, Georgia	1,318
13153	Houston County, Georgia	1,298
13089	DeKalb County, Georgia	495
13067	Cobb County, Georgia	464
13207	Monroe County, Georgia	449
13225	Peach County, Georgia	435
13135	Gwinnett County, Georgia	415
13063	Clayton County, Georgia	281
13169	Jones County, Georgia	232
13151	Henry County, Georgia	209
13289	Twiggs County, Georgia	207

FIGURE 6: WORKERS IN BIBB COUNTY, GEORGIA AND WHERE THEY LIVE

FIPS	Region	Commuters
13021	Bibb County, Georgia	53,274
13153	Houston County, Georgia	5,093
13169	Jones County, Georgia	4,834
13207	Monroe County, Georgia	2,583
13225	Peach County, Georgia	1,484
13079	Crawford County, Georgia	1,111
13135	Gwinnett County, Georgia	1,111
13089	DeKalb County, Georgia	954
13121	Fulton County, Georgia	900
13151	Henry County, Georgia	899
13289	Twiggs County, Georgia	800

FIPS codes are numbers which uniquely identify geographic areas. The number of digits in FIPS codes vary depending on the level of geography. State-level FIPS codes have two digits, county-level FIPS codes have five digits of which the first two are the FIPS code of the state to which the county belongs.

Figures 5 and 6 further demonstrate the county's position as the regional employment hub in the area with most residents working in the county. In addition, the county draws in nearly 20,000 additional employees from outside the county. Employers can feel confident that the residents of the surrounding counties will drive to Macon-Bibb for employment opportunities.

Taking a Closer Look at Target Industries

MBCIA has had great success in recruiting new industries thanks in part to a central Georgia location, proximity to military installations, ample water supply and a strong Industrial Authority. Now that the community has a strong existing industry base, it is time to reevaluate its industry targets and how the projects along with the associated jobs and wages impact the community holistically. While VisionFirst did not conduct a comprehensive target industry study, by considering existing industry supply chains, educational programs, sites, workforce demographics and assets there are several industry sectors that could prove to be successful for recruitment and raise the per capita income in the community. The next several figures provide a baseline of information about existing and emerging industry strength.

While site selectors and location advisors will likely review numbers such as these, it is vital that the Industrial Authority share the benefits of the current workforce along with the accolades from existing industry. It is also important to consider a larger geographic draw for those occupations significantly higher than the state and possibly the national average – as those wages often open up the potential for employees to move to the region.

Industries by Employment »

FIGURE 7: TOP 10 COUNTY INDUSTRIES BY EMPLOYMENT

NAICS	INDUSTRY	EMPLOYMENT	AVG ANN WAGES	LQ	5-YEAR HISTORIC GROWTH	10-YEAR FORECASTED GROWTH
62	Health Care & Social Assistance	17,066	\$54,791	1.34	1.0%	0.7%
44	Retail Trade	10,438	\$30,103	1.17	-4.3%	-0.9%
72	Accommodation & Food Services	8,323	\$16,485	1.14	0.7%	0.3%
52	Finance & Insurance	8,233	\$55,892	2.32	1.4%	-1.0%
61	Educational Services	6,716	\$43,055	0.94	-0.1%	-0.2%
31	Manufacturing	5,963	\$56,351	0.83	2.1%	-1.5%
56	Administrative & Support, Waste Management & Remediation Services	5,629	\$28,663	1.02	1.6%	-0.1%
81	Other Services (except Public Administration)	4,155	\$27,211	1.09	-0.2%	-0.5%
48	Transportation & Warehousing	3,756	\$45,646	0.92	4.4%	-0.3%
92	Public Administration	3,745	\$48,290	0.89	-1.0%	-0.5%
Total - All Industries		87,118	\$44,389	1.00	-0.3%	-0.2%

In addition to identifying the county's industries strengths, it is also important to consider the average pay for those industries relative to the average wage. Currently, average wages for the county, state and nation are:

Bibb County: \$44,389

Georgia: \$54,498

USA: \$58,849

Comparing those numbers to the top industries, retail trade along with accommodation and food services pay lower wages but provide opportunity to offer upskilling to employees to move to other industries such as manufacturing or transportation and warehousing.

Industry Clusters »

A cluster is a geographic concentration of interrelated industries or occupations. There are 22 industry clusters defined by JobsEQ. Industry clusters can form and grow because of a region's competitive advantages – resources such as location, trained labor and education systems. In addition, to the traditional clusters, VisionFirst included Aerospace Manufacturing in the 45-minute radius given the county's assets and proximity to Robins Air Force Base.

FIGURE 8: BIBB COUNTY INDUSTRY CLUSTERS

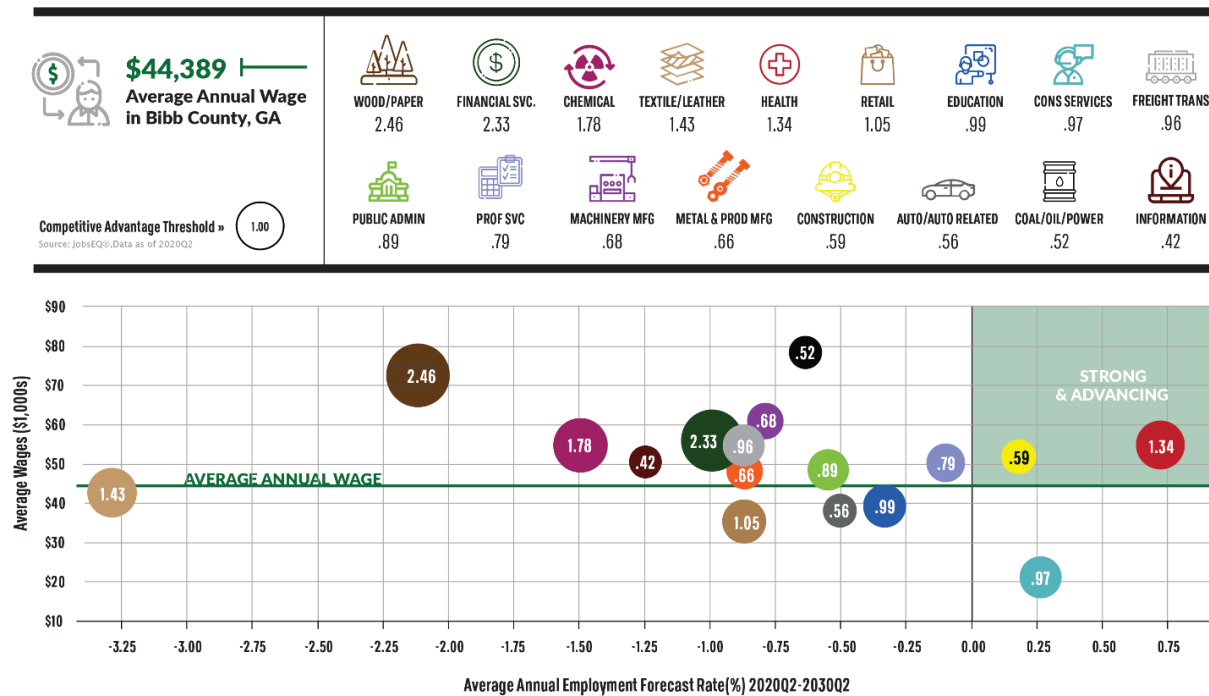
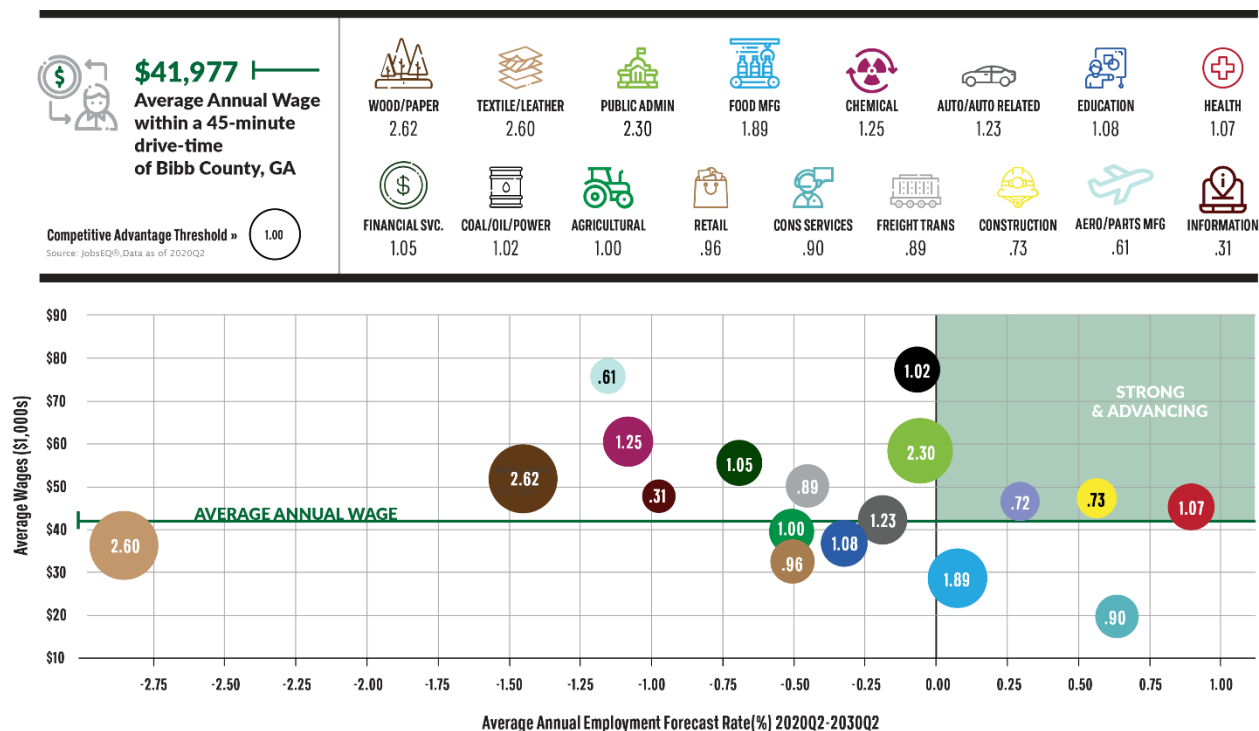


FIGURE 9: MACON-BIBB 45-MINUTE RADIUS INDUSTRY CLUSTERS



Current Employment Conditions »

Can employers, in today's market, find the employees they need?

Understanding the existing labor force and the growth/decline of targeted industries is an important first step to better positioning Macon-Bibb for future competitive projects that meet community objectives. It is also important to consider the workforce deficits when running project scenarios.

Using Chmura's JobsEQ "what-if" modeling to describe the labor availability of the Macon-Bibb region (45-minute drive-time) based on an incoming industry, VisionFirst ran workforce projections for 250 jobs in manufacturing, transportation equipment manufacturing, transportation/warehousing, food manufacturing and aerospace product and parts manufacturing and 100 jobs in information. Results in the following tables show the top 15 jobs in each cluster.

Column Glossary⁵

- **New Employer Demand:** Estimated: number of employees needed in the specified occupation by the incoming firm.

⁵ 1. Occupation employment and unemployment are place-of-residence data--that is, referring to workers who reside in the named locality. 2. Occupation wages are as of 2019 and represent the average for all Covered Employment

- **Employment Place of Residence:** Estimated number of workers currently employed in the occupation in the region by residence.
- **Unemployment:** Estimated number of workers unemployed in the occupation in the region by residence.
- **Employment Extended:** Regional workers meeting the following three criteria: Are currently employed; Have similar skills to the specified occupation (though may need additional training and/or certification to meet the specified occupation's requirements); Current wages are no more than 10% higher than average wages of the specified occupation.
- **Unemployment Extended:** Same as Employment Extended except these workers are currently unemployed.
- **Potential Candidate/Opening Ratio:** The ratio of potential candidates (employed plus unemployed) to the new employer demand. The coloring reflects varying ratio levels, red-orange-yellow-green, with the former representing short labor supplies and the lattermost reflecting generally ample supply. (The threshold for an "ample" supply varies industry to industry and occupation to occupation, but a general threshold of "50" is used in JobsEQ to denote the green level of generally ample supply.)

“What-If” Scenario for 250 Jobs in Manufacturing (NAICS 31)

SOC	Title	New Employer Demand	Empl (Place of Residence) ¹	Unempl ¹	Regional Avg Wage ²	National Avg Wage ²	Empl Extended	Unempl Extended	Potential Candidates per Opening
51-2092	Team Assemblers	17	2,312	209	\$30,200	\$34,800	680	52	148
51-1011	First-Line Supervisors of Production and Operating Workers	9	1,355	37	\$57,700	\$65,200	2,485	90	155
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	7	1,096	59	\$38,700	\$43,000	3,858	285	165
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	7	6,236	534	\$29,300	\$32,100	6	1	967
51-4041	Machinists	6	542	21	\$44,800	\$46,100	1,074	58	94
51-9111	Packaging and Filling Machine Operators and Tenders	6	793	78	\$34,800	\$33,600	12,435	1,048	145
51-4121	Welders, Cutters, Solderers, and Brazers	6	1,020	73	\$34,700	\$45,200	9,210	684	182

51-2028	Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	5	265	18	\$30,400	\$36,900	1,133	83	57
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	5	1,730	37	\$59,200	\$71,100	278	7	353
11-1021	General and Operations Managers	4	4,053	95	\$91,800	\$123,000	10,057	247	1,037
51-9198	Helpers--Production Workers	4	743	60	\$30,100	\$30,500	9,483	763	201
17-2112	Industrial Engineers	4	261	5	\$85,300	\$92,700	912	17	67
49-9041	Industrial Machinery Mechanics	4	909	31	\$52,400	\$55,300	5,380	211	235
49-9071	Maintenance and Repair Workers, General	4	2,876	101	\$35,000	\$42,000	479	17	744
43-5071	Shipping, Receiving, and Inventory Clerks	4	1,555	78	\$31,200	\$36,000	10,947	730	408

“What-If” Scenario for 250 Jobs in Transportation Equipment Manufacturing (NAICS 336)

Industries in the Transportation Equipment Manufacturing subsector produce equipment for transporting people and goods. Transportation equipment is a type of machinery. An entire subsector is devoted to this activity because of the significance of its economic size in all three North American countries. Full [list](#) of NAICS Codes that fall under 336.

SOC	Title	New Employer Demand	Empl (Place of Residence) ¹	Unempl ¹	Regional Avg Wage ²	National Avg Wage ²	Empl Extended	Unempl Extended	Potential Candidates per Opening
51-2092	Team Assemblers	43	2,312	209	\$30,200	\$34,800	680	52	59
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	9	1,096	59	\$38,700	\$43,000	3,858	285	128
51-4121	Welders, Cutters, Solderers, and Brazers	9	1,020	73	\$34,700	\$45,200	9,210	684	121
51-1011	First-Line Supervisors of Production and	8	1,355	37	\$57,700	\$65,200	2,485	90	174

	Operating Workers								
17-2112	Industrial Engineers	8	261	5	\$85,300	\$92,700	912	17	33
51-4041	Machinists	7	542	21	\$44,800	\$46,100	1,074	58	80
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	6	102	10	\$58,000	\$56,500			19
51-2099	Assemblers and Fabricators, All Other	6	528	42	\$30,100	\$34,800	2,312	209	95
51-4031	Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic	5	311	21	\$35,800	\$37,300	9,586	728	66
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	5	6,236	534	\$29,300	\$32,100	6	1	1,354
17-2141	Mechanical Engineers	5	240	5	\$81,600	\$93,500	408	8	49
51-4081	Multiple Machine Tool Setters, Operators, and Tenders, Metal and Plastic	5	232	16	\$35,900	\$38,400	456	32	50
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	5	1,261	20	\$91,500	\$111,600	3,100	69	256
17-2011	Aerospace Engineers	4	85	1	\$96,200	\$119,200	1,056	18	21
51-9124	Coating, Painting, and Spraying Machine Setters, Operators, and Tenders	4	370	19	\$33,400	\$41,300	6,513	477	97

“What-If” Scenario for 250 Jobs in Transportation and Warehousing (NAICS 48)

The Transportation and Warehousing sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road and pipeline. Full [list](#) of NAICS Codes that fall under 48.

SOC	Title	New Employer Demand	Empl (Place of Residence) ¹	Unempl ¹	Regional Avg Wage ²	National Avg Wage ²	Empl Extended	Unempl Extended	Potential Candidates per Opening
53-3032	Heavy and Tractor-Trailer Truck Drivers	41	4,098	208	\$39,900	\$46,900	2,493	119	105
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	33	6,236	534	\$29,300	\$32,100	6	1	205
53-3058	Passenger Vehicle Drivers, Except Bus Drivers, Transit and Intercity	16	1,548	84	\$23,900	\$33,200	714	48	102
53-3033	Light Truck Drivers	14	1,881	86	\$32,600	\$38,500	4,198	272	141
43-5052	Postal Service Mail Carriers	11	808	14	\$49,600	\$52,200	5,343	257	75
53-7051	Industrial Truck and Tractor Operators	9	2,202	159	\$35,100	\$37,900	10,096	725	262
53-7065	Stockers and Order Fillers	8	3,786	330	\$25,400	\$29,700	32,102	2,972	514
53-3052	Bus Drivers, Transit and Intercity	7	230	16	\$25,800	\$45,800	1,607	88	35
53-1047	First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	6	889	35	\$50,400	\$57,800	10,105	361	154
49-3031	Bus and Truck Mechanics and Diesel Engine Specialists	4	634	28	\$44,000	\$50,400	2,644	111	166
43-4051	Customer Service Representatives	4	4,858	242	\$34,200	\$37,300	4,386	237	1,275
43-5032	Dispatchers, Except Police, Fire, and Ambulance	4	351	21	\$34,500	\$44,100	3,441	108	93

53-2031	Flight Attendants	4	343	7	\$50,700	\$56,200			87
43-9061	Office Clerks, General	4	4,422	207	\$29,700	\$36,400	6,973	336	1,157
43-5053	Postal Service Mail Sorters, Processors, and Processing Machine Operators	4	191	6	\$48,200	\$51,200	8,913	558	49

“What-If” Scenario for 250 Jobs in Food Manufacturing (NAICS 311)

Industries in the Food Manufacturing subsector transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products. The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included. Full [list](#) of NAICS Codes that fall under 311.

SOC	Title	New Employer Demand	Empl (Place of Residence) ¹	Unempl ¹	Regional Avg Wage ²	National Avg Wage ²	Empl Extended	Unempl Extended	Potential Candidates per Opening
51-9111	Packaging and Filling Machine Operators and Tenders	23	793	78	\$34,800	\$33,600	12,435	1,048	38
51-3092	Food Batchmakers	19	305	15	\$33,900	\$33,100	1,561	156	17
51-3022	Meat, Poultry, and Fish Cutters and Trimmers	19	889	44	\$25,200	\$28,800	6,401	564	49
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	12	6,236	534	\$29,300	\$32,100	6	1	564
51-3011	Bakers	11	325	25	\$23,900	\$29,600	9,894	781	32
53-7064	Packers and Packagers, Hand	11	1,489	150	\$23,100	\$27,700	6,327	584	149
51-3023	Slaughterers and Meat Packers	11	513	26	\$28,200	\$29,600	2,504	244	49
51-1011	First-Line Supervisors of Production and Operating Workers	9	1,355	37	\$57,700	\$65,200	2,485	90	155
51-9198	Helpers-- Production Workers	8	743	60	\$30,100	\$30,500	9,483	763	100

49-9041	Industrial Machinery Mechanics	6	909	31	\$52,400	\$55,300	5,380	211	157
53-7051	Industrial Truck and Tractor Operators	6	2,202	159	\$35,100	\$37,900	10,096	725	394
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	6	1,096	59	\$38,700	\$43,000	3,858	285	192
49-9071	Maintenance and Repair Workers, General	6	2,876	101	\$35,000	\$42,000	479	17	496
51-3099	Food Processing Workers, All Other	5	192	14	\$29,200	\$28,800			41
53-7061	Cleaners of Vehicles and Equipment	4	871	97	\$22,800	\$27,900	12	1	242

“What-If” Scenario for 250 Jobs in Aerospace Product and Parts Manufacturing (NAICS 3364)

This industry group comprises establishments primarily engaged in manufacturing aircraft, missiles, space vehicles and their engines, propulsion units, auxiliary equipment, and parts thereof. Full [list](#) of NAICS Codes that fall under 3364.

SOC	Title	New Employer Demand	Empl (Place of Residence) ¹	Unempl ¹	Regional Avg Wage ²	National Avg Wage ²	Empl Extended	Unempl Extended	Potential Candidates per Opening
51-2011	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	18	102	10	\$58,000	\$56,500			6
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	14	1,261	20	\$91,500	\$111,600	3,100	69	92
17-2112	Industrial Engineers	13	261	5	\$85,300	\$92,700	912	17	20
17-2011	Aerospace Engineers	11	85	1	\$96,200	\$119,200	1,056	18	8
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	11	1,096	59	\$38,700	\$43,000	3,858	285	105

49-3011	Aircraft Mechanics and Service Technicians	9	473	10	\$56,300	\$67,100	977	31	54
51-4041	Machinists	9	542	21	\$44,800	\$46,100	1,074	58	63
17-2141	Mechanical Engineers	7	240	5	\$81,600	\$93,500	408	8	35
13-1198	Project Management Specialists and Business Operations Specialists, All Other	6	2,911	82	\$71,200	\$80,200	1,722	25	499
51-2092	Team Assemblers	6	2,312	209	\$30,200	\$34,800	680	52	420
51-9161	Computer Numerically Controlled Tool Operators	5	188	10	\$39,900	\$43,200	1,406	69	39
17-2071	Electrical Engineers	5	197	5	\$91,500	\$103,500	1,633	28	40
51-1011	First-Line Supervisors of Production and Operating Workers	5	1,355	37	\$57,700	\$65,200	2,485	90	279
13-1081	Logisticians	5	451	8	\$72,000	\$78,700	1,929	38	92
43-5061	Production, Planning, and Expediting Clerks	5	496	15	\$49,000	\$50,600	1,592	70	102

“What-If” Scenario for 100 Jobs in Information (NAICS 51)

The Information sector comprises establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data. Full [list](#) of NAICS Codes that fall under 51.

SOC	Title	New Employer Demand	Empl (Place of Residence) ¹	Unempl ¹	Regional Avg Wage ²	National Avg Wage ²	Empl Extended	Unempl Extended	Potential Candidates per Opening
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	9	1,261	20	\$91,500	\$111,600	3,100	69	142
43-4051	Customer Service Representatives	5	4,858	242	\$34,200	\$37,300	4,386	237	1,020
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	5	1,274	74	\$47,900	\$66,800			270

49-2022	Telecommunications Equipment Installers and Repairers, Except Line Installers	5	369	9	\$45,200	\$58,600	2,248	108	76
15-1232	Computer User Support Specialists	3	821	27	\$47,300	\$56,600	481	22	283
27-3041	Editors	3	58	3	\$57,400	\$71,900	89	4	20
13-1161	Market Research Analysts and Marketing Specialists	3	675	18	\$55,900	\$71,600	3,582	78	231
27-2012	Producers and Directors	3	90	5	\$62,900	\$93,900	910	37	32
41-3011	Advertising Sales Agents	2	71	2	\$49,100	\$64,700	786	22	37
11-3021	Computer and Information Systems Managers	2	472	8	\$122,400	\$156,400	2,361	48	240
15-1299	Computer Occupations, All Other	2	1,397	33	\$79,000	\$92,400	3,194	91	715
15-1211	Computer Systems Analysts	2	697	11	\$73,500	\$96,200	2,219	52	354
11-1021	General and Operations Managers	2	4,053	95	\$91,800	\$123,000	10,057	247	2,074
27-3023	News Analysts, Reporters, and Journalists	2	32	1	\$66,300	\$62,400	281	14	17
43-9061	Office Clerks, General	2	4,422	207	\$29,700	\$36,400	6,973	336	2,314

Based on high-level data, the region has strong labor availability when analyzing NAICS codes at a two- and three-digit level. Diving down into six-digit NAICS codes will reveal a more accurate interpretation of the region's current labor pool - both an excess of labor and gaps.

Specifically, as it relates to aerospace manufacturing, the two biggest gaps exist in aerospace engineers and aircraft structure assemblers. While there is a deficit in Macon, the region is fortunate to have high numbers in both those occupations – specifically in Atlanta, Savannah and Columbus. Given the attractiveness of the community, Macon-Bibb could recruit new talent to the region.

In addition, utilizing the data gathered along with an on-the-ground understanding of the assets, demographics and infrastructure, MBCIA should consider three factors to identify target industries along with niche subsectors for recruitment:

1) Industries projected to grow over the next 10 years by at least 0.8% annually, as that is the baseline expected growth for Georgia as the county and region are expected to decline;

2) Industries that the region boasts a high location quotient (at least greater than 1.00 but ideally 1.25 or higher); and

3) Industries that have a higher-than-average annual county wage of \$44,389

While most industries are projected for a loss in the next 10 years, through targeted investment in product and workforce training Macon-Bibb can drive higher-wage, competitive projects to the region, **specifically in Manufacturing, Finance and Insurance as well as Transportation and Warehousing, Aerospace Manufacturing/MRO and potentially niche industry recruitment in cybersecurity leveraging Air Force assets and downtown redevelopment.**

Evaluating the Toolbox

Product Review »

One of the biggest limiting factors a community faces to compete for economic development projects today is the availability of quality sites. The county is fortunate to have two Georgia Ready for Accelerated Development (GRAD) sites which have seen recent success. MBCIA also has a large portfolio of sites for development and should also be commended for proactively partnering with Georgia Power to identify new site locations.

In looking at Macon-Bibb there are a number of logistical assets that make property in the region more attractive to prospects, including:

- Two interstates intersecting at I-75 and I-16
- Norfolk Southern and Cordele Intermodal Center
- Two airports
- A robust water authority and excess capacity
- Proximity to Atlanta's MSA and its amenities, including Hartsfield-Jackson International Airport
- Proximity to the Port of Savannah and Port of Brunswick

However, despite these assets and the vast portfolio of sites under MBCIA's control, there are a number of discrepancies between [Macon-Bibb's GIS web recruitment page](#), [Georgia's Electric Membership Corporation](#) and the state of [Georgia's site selector property database](#).

Need for Consistent Digital Presence & Data on Sites

Pre-pandemic, having an online presence and ample marketing collateral to connect with customers was considered a competitive advantage. But today, online databases and marketing materials are essential when it comes to promoting industrial products and assets within a region – ultimately increasing a community's credibility and chance to compete for competitive projects.

First impressions are everything, especially for those looking to stand out in a highly competitive market. While the organization follows the GRAD development guidelines, the amount of due diligence associated with this program is not emphasized or addressed in the site listings. The following checklist can help rectify inconsistencies as well as inform and establish trust among potential customers while also improving asset awareness.

FIGURE 10: COMPETITIVE PROPERTY CHECKLIST

- ☐ **Recent Aerial Photography**
- ☐ **Letter of Commitment (if applicable)**
- ☐ **Conceptual Site Plans**
- ☐ **Covenants**
- ☐ **Executive Summary**
- ☐ **Flood Map**
- ☐ **Foreign Trade Zone**
- ☐ **Gantt Analysis/Timeline**
- ☐ **Infrastructure Development Plants for Sites not Shovel Ready**
- ☐ **Location/Vicinity Maps** *with local and regional amenities:*
 - ☐ Global
 - ☐ USA
 - ☐ Regional
 - ☐ County
 - ☐ City
 - ☐ Ingress/Egress Routes to Property
- ☐ **New Market Tax Credits**
- ☐ **Ownership/Tax Maps**
- ☐ **Report/Summaries:**
 - ☐ Phase I
 - ☐ Environmental
 - ☐ Geotechnical
 - ☐ Soils
 - ☐ Wetlands
- ☐ **Topography Map**
- ☐ **Zoning Map** *with surrounding areas up to one mile*
- ☐ **Utility Maps** *with existing and proposed utilities defined and providers). Consider using the [APWA color guide](#) to highlight current a*
infrastructure.
 - ☐ Broadband/Fiber
 - ☐ Electric
 - ☐ Natural Gas
 - ☐ Telecommunications
 - ☐ Water
 - ☐ Wastewater and Sewer

Best Practices

- 01** Provide downloadable links to MBCIA existing KML/KMZ Google Earth files on executive summaries on online databases.
- 02** Drone videos and photography are an effective marketing tool. Enhance drone site footage to create **360°**, interactive drone photos for virtual site tours to engage prospective clients. [Kuula Pro](#) offers an inexpensive platform for virtual site tours.
- 03** [Creativemarket.com](#) offers inexpensive and customized templates (Microsoft Word and PowerPoint) that can be used to develop branded MBCIA executive summaries.

Color	Utility Line
WHITE	Proposed Excavation
PINK	Temporary Survey Markings
RED	Electrical Power Lines, Cables, Conduit and Lighting Cables
YELLOW	Gas, Oil, Steam, Petroleum or Gaseous Materials
ORANGE	Communication, Alarm or Signal Lines, Cables or Conduit
BLUE	Potable Water
PURPLE	Reclaimed Water, Irrigation and Slurry Lines
GREEN	Sewer and Drain Lines

Review of Select GRAD Sites

To better understand the availability and positioning of MBCIA's sites, a driving tour and high-level review of five sites was conducted.

Airport East Industrial Park

Overview: The Airport East site, a GRAD Certified Site, is divided into four parcels: 20, 20.4, 69.056 and 75.2 acres and valued at \$35,000 per acre. Existing industry suggests infrastructure is in place, which offers opportunities for business expansion and growth.

Advantages	Challenges
<ul style="list-style-type: none">• GRAD Certified Site• Relatively flat and cleared/graded• Direct access to Highway 129 – and 4.9 miles to I-16, 6.9 miles to I-75• All utilities on site or adjacent to parcels• Zoned light industrial• Name recognition anchor tenant – Kohl's Distribution• Announcement of new hangar draws attention to the area	<ul style="list-style-type: none">• Although the online site flyer lists the property as a GRAD certified site, there is little information reflecting what that means. Consider highlighting the GRAD programs due diligence standards to ensure unfamiliar audiences understand the significance• Lacks relevant information: ownership and if located within city limits• Located adjacent to the Middle Georgia Regional Airport, the available parcels are divided by Highway 129 and Norfolk Southern railroad• Limited in overall acreage

Sofkee Industrial Park

Overview: The Sofkee Industrial Park, A GRAD Certified Site, is home to recent investments including Kumho Tire Georgia and Irving Paper. These investments ensure the adjacent property have updated transportation and utility infrastructure, while also posing concerns regarding limited acreage and utility demand. Online databases offer a variety of site sizes, including 206-214 acres with a maximum contiguous 54 acres available.

Advantages	Challenges
<ul style="list-style-type: none">• GRAD Certified Site• Adjacent to Norfolk Southern RR• Direct access to Highway 129• All utilities on site or adjacent to parcels• Permits approved – wetland delineations	<ul style="list-style-type: none">• Various online databases, Macon-Bibb's website and Georgia's EMC website have competing information on property availability and maximum continuous acreage• Lacks relevant information: ownership and if located within city limits

Airport North Industrial Park

Overview: The Airport North site consists of 112 acres and valued at \$35,000 per acre. Online mapping suggests the site is partially cleared. Little is revealed about the site, as it does not appear to be listed on [Macon-Bibb's GIS web recruitment page](#).

Airport South Industrial Park

Overview: According to on [Macon-Bibb's GIS web recruitment page](#), the Airport South site consists of 4 tracts – 9.69, 31.5, 21 and 135 acres – some acreage is cleared while other is wooded - and valued at \$35,000 per acre. Existing industry suggests infrastructure is in place, which offers opportunities for business expansion and growth. Existing transportation corridors limit parcel sizes. Currently, the sites are all listed as not for sale or lease. In addition to limited information online, several of the parcels are lacking attachments, photos and site plans.

Allied-reduced Site

Overview: Unless listed under alternative names, this property does not appear to be listed on [Macon-Bibb's GIS web recruitment page](#). Consisting of 7 tracts – 15.43, 10, 4.12, 9.82, 5, 15.6 and 49.48 acres – valued at \$35,000 per acre. Several of the tracts appear to be bordering a railroad and adjacent to an intermodal yard, it is unclear which rail line would service the sites. The large cluster of existing industries would again suggest on-site infrastructure is in place and easily accessible to interstate or highway infrastructure – but it is not noted on the site map.

Incentive Review »

Marketing the Business Climate

Today, many companies considering a new location will eliminate numerous communities based on desktop research that evaluates site availability, workforce availability, state and local business tax environment and especially the availability of local incentives. A review of MBCIA's website shows limited incentive and property information. While every consultant has their own criteria, which can change depending upon the needs of the client, the current website lacks the availability to see and complete applications online, an explicit listing of targeted industries that qualify for incentives, and a listing or link to access tax rates and structure. An argument can be made that the lack of information leads to a direct contact, but it can just as easily lead to an elimination. VisionFirst recommends supplying additional data related to targeted industries, incentive opportunities and tax rates on the website.

To be competitive in recruiting high paying jobs in targeted industries such as data centers, advanced manufacturing, information technology and financial services, this information should be readily accessible and clearly indicate both the incentives available and the approval and compliance process. It is rare for a company not to have options when selecting a site for a planned facility – even industries considering an expansion often have other locations within the company that are also vying for the same jobs and investment.

The importance of financial incentives cannot be denied, but it is equally important to remember that incentives are an investment where a return must be considered.

Most communities with successful economic development programs have developed a toolbox of incentives that are judiciously offered based on the specific interests and concerns of the company rather than a “one-size fits all” approach where no customization is allowed.

Finally, an effective incentive program must be designed to meet the economic development goals identified with a simple application and compliance process. An incentives approach that ensures that the company's commitments are met prior to public funds being expended and allows for transparency and clear reporting allow the community to fairly assess whether the incentive tools are generating the desired effect.

With these principles in mind, VisionFirst Advisors has reviewed the existing incentive programs and finds that the existing incentives offered are standard. The recommendations on the following pages build on the existing programs and add additional criteria to help raise the average annual county wage, which Macon-Bibb County has identified as a priority.

Incentive Toolbox Considerations

Emphasize Fast-Track Permitting and Assist Workforce Training Navigation

Before addressing recommended changes to the property tax exemptions and grant considerations, there are two other types of incentives offered by MBCIA that cannot be devalued – fast track permitting and workforce training navigation. These services should be promoted on the website and should be a standard incentive offered to all industries in the area. The site should detail the services offered along with testimonials from satisfied businesses, employees and workforce training providers.

In order to raise the county average wage, a well-trained workforce is critical. To be successful, MBCIA must be able to act as an ambassador to new companies and help them navigate the workforce training process – such as Quick Start - and assist with challenges along the way. This type of “hands-on” service is critical when trying to raise average salaries.

In today's economic development environment, speed is often a larger driver than incentives, and fast track permitting services can be invaluable for projects with a tight timeline. Again, this type of incentive documented on the website may keep Macon-Bibb County in a site selection before knowing it is occurring.

Target Incentives to Maximize Available Resources & Address Top Challenges/Needs

Every entity has limited resources. For economic development entities, these limitations can be in funding, available property, infrastructure or workforce. The key to a sound incentives policy is to acknowledge limitations and build a process to maximize the value of resources available.

One identified challenge is the lack of property available for development. VisionFirst suggest existing sites should be marketed only to targeted industries, with the understanding of limitations that exist when the sites are not controlled by MBCIA. The recommendation is to consider limiting or even eliminating all incentives for any industry that is not a targeted industry or will create jobs that pay below the county average wage.

Another limitation identified in the research is with workforce. The unemployment rate in Macon-Bibb County is slightly lower than the state average, but the county average wage is significantly lower than the state average. One way to improve the quality of life within the county is to work to raise the county average wage. To accomplish this, the jobs being attracted in the county must pay a higher wage. This is a natural area to focus incentives.

Leverage Special Tax Valuation

VisionFirst compliments the MBCIA team on the existing Special Tax Valuation Schedule. The following framework should be utilized moving forward, with modifications to include weighting for wage and targeted industries.

Property Tax abatement is a primary area where local communities can make a difference in potential projects. It is sometimes hard to convey the message that abatements are not a reduction in the current tax revenues – they are a partnership with the new or expanding industry and an investment in future community growth and tax revenues. Always remember that 100% of nothing is still nothing.

Figure 11 uses the current structure, with an additional parameter of wages, to define the abatement available to new and existing industries that wish to locate or expand in the Macon-Bibb area.

FIGURE 11: SPECIAL TAX VALUATION SCHEDULE

JOBS	WAGES	INVESTMENT	ABATEMENT
25	Less than county average wage	\$25 million	0%
25	Greater than or equal to county average wage	\$25 million	40%
25	Over 125% of county average wage	\$25 million	50%
25	Over 150% of county average wage	\$25 million	60%
50	Less than county average wage	\$50 million	20%
50	Greater than or equal to county average wage	\$50 million	50%
50	Over 125% of county average wage	\$50 million	60%
50	Over 150% of county average wage	\$50 million	70%
100	Less than county average wage	\$100 million	20%
100	Greater than or equal to county average wage	\$100 million	60%
100	Over 125% of county average wage	\$100 million	70%
100	Over 150% of county average wage	\$100 million	80%

For this table VisionFirst recommends that if a company creates the jobs and wages OR makes the investment and wages, the corresponding percentage abatement would apply. Additionally, the community must define the period for which this abatement will apply. VisionFirst recommends 10 years, assuming that the jobs, wages and investment parameters are maintained. This will encourage the creation of high-paying jobs in the community.

To be clear, VisionFirst is suggesting that this be the standard guideline, with the full understanding that unique projects, or projects that could create future opportunities should be evaluated individually.

Any good incentive policy requires monitoring to ensure that tax incentives awarded are producing the desired outcome. This typically is accomplished by annual reporting by the company, and review by the economic development agency. Current accounting guidelines require that all abatements be reported in the city and/or county's financial statements, so this type of review can also help with monitoring.

It is a good approach to begin with any existing state-level performance standards and reporting, modifying only as necessary to accommodate local program requirements. These standards should address the resolution strategy if a company fails to create the required number of jobs or make the minimum capital investment. Most companies expect this resolution to be based on a materiality test and be scaled based on the failure. For example, if the project is within 80% of its commitment, there are no repayment requirements, and if project is below 80%, the company repays a proportional percentage of the incentive for the year in question.

Additionally, a standard beginning date for performance needs to be identified – the state uses one year after the certificate of occupancy, which would be VisionFirst's recommendation. Not only is a seamless incentive strategy and sound economic development policy, but it also assists in the new GASB 77 tax abatement disclosure reporting requirements.

Proposed Common Incentive Strategy

As stated earlier, the existing framework created by MBCIA is competitive. VisionFirst proposes a tiered structure that will allow all new companies in the community to feel welcome but to concentrate grant funds and abatements on the targeted industries that can partner with the community to help Macon-Bibb County reach their goals.

Tier I

Industrial projects are considered to be Tier 1 if they meet the follow criteria:

- Are outside the defined target industries.
- Have average annual wages less than 100 percent of county average wage.
- Create significant additional stress to the existing infrastructure.

For these projects, standard economic development assistance will be provided, but no additional funding or significant abatements will be provided. This level of incentive would require no board approval and will free up the staff to concentrate on projects that “move the needle” for Macon-Bibb County. Proposed incentives would include:

- Fast Track Permitting
- Workforce and Training Assistance
- Level One Freeport Exemption

Tier 2

For projects within targeted industries or that create jobs paying over 125% of the county average wage, MBCIA would coordinate closely with companies to create a compelling incentives package. Packages would include the permitting, freeport exemption and workforce assistance listed in Tier 1, as well as:

- Tax abatements based on the updated schedule (Figure 11)
- Potential grant funds to be used for impact fees, permitting, workforce development and/or other approved usage. This grant should be available for up to \$1,500 per job created.

Tier 3

For projects that promise transformative change for the entire community, MBCIA will work with the economic development team to create a customized incentive package over and above the incentives provided in Tier 1 and 2.

This strategy will allow MBCIA to concentrate their efforts on projects that can help Bibb County and the entire community to continue the progress being made and will allow the team to quickly respond to requests for proposals and consultant questions.

Measuring Return »

An important component of economic development is demonstrating value to stakeholders as well as the taxpayers after a project is announced and an incentive is awarded. One way to do so is through case studies that measure the overall impact of a project to include direct and indirect jobs, property tax values as well as total payroll. These metrics go beyond the traditional discussion of incentives offered to paint a more comprehensive picture of the long-term economic impact. To assist MBCIA, VisionFirst created the following template for Irving Tissue for reference.

Company Name: Irving Tissue

Project Year: 2019

Target Industry: Paper Manufacturing

Company Overview: Irving Tissue produces premium household store brand paper products for many of North America's top retailers, in addition to some of the top-selling tissue brands in the marketplace. It is part of Irving Consumer Products, one of North America's leading manufacturers of household paper and baby diaper products.

Project Overview: In 2019, Irving Tissue opened its new \$870 million, 800,000 sq ft plant. The plan is located on Allen Road in the Sofkee Industrial Park and currently employs more than 250 people. It produces ultra-premium quality household paper products including soft bath tissue and paper towels.

- **New Jobs Committed:** 361
- **New Jobs Created to Date:** 250
- **Wage:** \$56,872 (125% over the average annual wage in Macon-Bibb)
- **Types of Jobs & Education Level:** On-the-Job Training & Industry Certificates
 - Paper Goods Machine Setters
 - Production Workers
 - Supervisors
 - Industrial Machinery Mechanics
 - Industrial Truck & Track Operators
- **Capital Investment Committed:** \$870 million
- **Capital Investment Made to Date:** \$640 million
- **Estimated Project Completion Date:** 2022
- **Competitor Communities/States:** Mississippi, Oklahoma, Texas and Florida

Incentives Awarded

Incentive Type	Type	Term	Amount	Amount Paid
Local Incentive	Cash		\$9.7 million	\$9.7 million
State Incentive	Cash		\$1.5 million	\$1.5 million
Property Tax Abatement	Tax Credit	22 years	\$73,954,146	\$5,963,366
Georgia Quick Start	Workforce Assistance		\$929,339	\$929,339

Return on Investment

Annual Property & Service Taxes	Total Annual Payroll	Indirect Job Creation	Construction Job Creation
\$2,476,205 (avg.)	\$22,000,000	387	1,000+

Indirect Job Creation: The first phase of the expansion involved 1.5 million hours of work for contractors during construction with more than 1,000 people on site at peak. In addition, nearly 50 Georgia companies were contracted during the build with dozens more subcontracted. Phase Two of the project is expected to involve approximately one million hours of work for contractors.

Education Partnerships: A key driver in any project is workforce. Georgia is fortunate to have the Quick Start Program. In the Quick Start Program, the colleges provide customized, job-specific training, as well as a host of other training to aid in continuous improvement — increasing efficiency, reducing waste and adding value to industry partners. For Irving Tissue, Central Georgia Technical College assisted in testing of the local workforce to assess skills while also encouraging residents to enroll in programs to fulfill future needs.

Community Commitment: Irving has continued to exceed expectations in its overall commitment to the project parameters and Macon-Bibb community overall. On the same day of the groundbreaking ceremony the company announced an expansion nearly doubling the project size and impact. In addition, the company provided meal to more than 500 first responders after the devastation from Hurricane Irma. The company also donated \$30,000 to local charities impacted by the storm.

Macon-Bibb's Paper Manufacturing Industry

- 1,406 jobs
- Average Wage: \$76,788 compared to \$69,617 in the nation
- 2.1% increase in the industry over the last 10 years compared to -1.0% loss in the nation
- \$676,000 Output per Worker compared to \$535,000 in the nation. Growth in productivity (output per worker) leads to increases in wealth and higher average standards of living in a region.

Postsecondary Programs Linked to Paper Manufacturing

Program	Awards
Mercer University	
Accounting	60
Business/Commerce, General	232
Computer Software Engineering	18
Electrical and Electronics Engineering	11
Engineering, General	133
Engineering, Other	11
Marketing/Marketing Management, General	52
Mechanical Engineering	15
Middle Georgia State University	
Business Administration and Management, General	137
Industrial Production Technologies/Technicians, Other	2

Return Summary

Macon-Bibb County aggressively and successfully recruited the Irving Tissue project. The community developed an incentive package that provided a cash incentive of \$9.7 million and long-term property tax abatement which has an estimated value of nearly \$74 million. But beyond the incentive and traditional job creation numbers, it is critical to recognize the overall community benefits of more than 1,000 construction jobs, the 387 indirect jobs and the long-term benefits of a direct annual payroll of more than \$22 million. The combined impacts not only increases the average annual income of the entire county, but also influences the types of retail and industry that may consider Bibb County.

It is also important to acknowledge the immediate new tax revenues the county is experiencing as a result of the project. **The property where Irving Tissue is located was generating annual property taxes of \$2,584, and today the facility is generating approximately \$2.5 million in local taxes annually.** This tax increase repays the cash incentive in less than five years. Over the course of the abatement period, the property will generate more than \$50 million in new tax revenues – again on land that would have produced less than \$60,000 in taxes over that same period. However, these numbers do not consider any expansions that may occur at the site.

SWOT Analysis & Leverage Points

Based on the conversations with stakeholders and the in-depth labor and industry research, VisionFirst identified the region's strengths, weaknesses, opportunities and threats regarding the community's economic development efforts as well as the area's competitiveness overall. This analysis relied heavily on qualitative input as well as industry knowledge.

STRENGTHS

- Multiple Higher Education Partners/Providers
- Significant Recent Project Wins
- Robins Air Force Base
- Downtown Revitalization
- New Town Programs
- Runway Extension & Airport
- Available Water & Water Authority
- Interstate & Port Access (ATL)
- Rail Access – Infrastructure
- Mercer & Higher Education Assets
- Proximity to Hartsfield-Jackson International Airport

WEAKNESSES

- Lack of Available Product
- No Mega Site for Transformative Project
- Confusion Among Workforce Coordination
- Blighted Community Entrances
- Historic Transparency & Accountability Perceptions
- Lack of Airport Authority
- Funding Model
- Need for Additional Training on Industrial Authority's Role

OPPORTUNITIES

- Partnerships with Surrounding Counties for Projects & Product Development
- Increasing Achievement in K-12 Schools
- Increased Marketing & Communications
- Central Georgia Joint Development Authority
- Joint Mega-Site Development
- Public-Private Partnerships at the Airport

THREATS

- Perceptions Surrounding Community's Image – Crime & Poverty
- Long-Term Airport Oversight
- Lack of Ability to Collaborate to Achieve Common Goals
- Online Presence Shaping Opinions



Leverage Points »

Far too often SWOT analyses are conducted for discovery purpose only. VisionFirst goes beyond the initial step of conducting the analysis and develops strategies to leverage or capitalize on each strength or opportunity and to minimize or mitigate weaknesses and threats. These strategies or “leverage points” help to illustrate the timeliest, most important calls-to-action for the county to execute to strengthen its position, achieve its mission and move the community to a greater competitive stance for jobs and investment.

Strength	Leverage Point
Significant Recent Project Wins	Utilize recent project wins to define a plan of work with measurements and create a high-performing economic development organization.
Weakness	Leverage Point
Lack of Available Product	Leverage available water, airports and neighboring counties through the Joint Development Authority to identify and conduct due diligence on regional sites.
Opportunity	Leverage Point
Increased Marketing & Communications	Develop a comprehensive marketing and communications plan for internal and external customers that demonstrates the community’s assets and the MBCIA ROI for projects.
Threats	Leverage Point
Perceptions Surrounding Community’s Image	Advocate for community development programs and projects that change the narrative about the region – placemaking, improvements in education and crime.

Core & Enabling Strategies

1. Advance to a High Performing Sustainable Organization
2. Improve & Expand Product Development
3. Identify & Market to Target Industries
4. Increase Marketing & Communications Efforts
5. Serve as an Advocate for Community Competitiveness



Strategies & Tactics

Vibrant local economies are the result of holistic strategy that requires collaboration from elected officials, private business leadership, education/workforce providers, downtown development, nonprofit organizations and many others; all having a shared vision of success.

To develop the goals, strategies and tactics, VisionFirst reviewed MBCIA's economic development activities to assess effectiveness in aligning assets, talent and resources to be competitive for jobs and investment. VisionFirst considered the support and the demands placed on the organization that fall within and outside its purview in determining what should be its primary focus over the next five years.

Utilizing facts and trends drawn from the data⁶ as well as economic development best practices, a group of three core strategies and two enabling strategies were identified for implementation. Within each strategy is a series of tactics that provide an approach to implementation.

- **Core Strategy:** Core strategies are those that fall directly within the purview of MBCIA. They are essential for the organization to meet its mission and improve the economic vitality of the community.
- **Enabling Strategy:** Enabling strategies are designed to assist the core strategies by providing the resources and infrastructure required to achieve success within the organization's objectives. For these strategies, MBCIA may partner with other organizations or entities to facilitate or advocate for change.

For the purpose of the plan, the timeframes are defined as:

- **Short-Term:** Three Months to One Year
- **Mid-Term:** One Year to Three Years
- **Long-Term:** Three Years to Five Years

⁶ Unless otherwise noted all data is compiled from JobsEQ

1. Advance to a High Performing Sustainable Organization

Core Strategy

MBCIA is currently seeking to become an accredited economic development organization by the International Economic Development Council. By doing so, MBCIA would become only the third organization in Georgia to achieve this accreditation, and the first Industrial Authority in the state to do so.

While this accreditation provides some valuable benchmarks to success, the organization should strive to further elevate its structure. MBCIA has successfully operated as intended from the inception; however, there remains confusion in the community about its purpose and its contributions to the economic success of the county.

MBCIA is more than an economic development marketing organization. It is a constitutionally created authority that has capacity and resources to be a conduit for job creation and investment of private capital. Continued leadership, community trust and high-performance operations are key to the Industrial Authority's success and sustainability.

TACTIC: Strengthen board leadership and understanding.

The Industrial Authority does not create jobs, but its ability to operate, own, lease and manage assets currently valued at more than \$40 million⁷ are vital to Macon-Bibb County's continued economic prosperity.

It is important that current and new board members understand the complexity and operations of the authority. A board orientation should be developed that becomes part of the onboarding process of any new member and can be expanded to other community leaders. Components of the orientation should include, but not limited to, the following components:

- Ethics policy
- Role of the board
- Portfolio of assets
- How MBCIA fits in the economic development ecosystem
- Overall value proposition of past projects
- Role of the staff
- Financial overview
- Confidentiality of work and what is shared publicly (consider signing nondisclosure agreements for projects)

TACTIC: Align organizations for holistic approach to economic development.

The definition of economic development success varied among the multiple entities interviewed. There is strength in having multiple organizations involved in economic

⁷ 2019 Audit

development, but without an aligned approach, there will continue to be confusion of how the entities collaborate to achieve common goals.

The leadership of MBCIA should host a joint meeting of the various community organizations who have a role in holistic economic development to facilitate a discussion on identifying various customer groups and how each entity provides programs, products and services to them. The group should be small and kept to a volunteer leader and paid executive of each organization. An outside facilitator would be best to conduct this meeting, allowing for an open discussion about servicing client groups and not positioning organizations.

This client-focused approach to delivery of services will provide a pathway to better collaboration and more efficient alignment of resources for economic development in the county. In addition to MBCIA, the following organizations should be included in the initial discussion: Greater Macon Chamber of Commerce, New Town Macon, Mercer Innovation Center and Visit Macon.

FIGURE 12: IDENTIFYING POTENTIAL CUSTOMER GROUPS

	Needs	Expectations	Programs, Products, Services
Competitive Projects	<ul style="list-style-type: none"> • Site and building information • Understanding of business costs 	<ul style="list-style-type: none"> • Accurate, confidential timely & understandable 	<ul style="list-style-type: none"> • Sites/buildings database, incentives, workforce data & training • Tailored solutions with ROI
Existing Industry	<ul style="list-style-type: none"> • Workforce, permitting, data 	<ul style="list-style-type: none"> • Accurate, confidential timely & understandable 	<ul style="list-style-type: none"> • Workforce & training programs, incentives
Small Businesses	<ul style="list-style-type: none"> • Grow business 	<ul style="list-style-type: none"> • Assistance in building local customer base 	<ul style="list-style-type: none"> • Workshops, networking events
Entrepreneurs	<ul style="list-style-type: none"> • Access to capital, space, mentorship, etc. 	<ul style="list-style-type: none"> • Pathways to success 	<ul style="list-style-type: none"> • Formal programs
Community Stakeholders	<ul style="list-style-type: none"> • Economic prosperity 	<ul style="list-style-type: none"> • New businesses and job opportunities 	<ul style="list-style-type: none"> • Dashboard of economic measures
Remote Workers and Visitors	<ul style="list-style-type: none"> • Information on places to visit/live 	<ul style="list-style-type: none"> • Quality of life 	<ul style="list-style-type: none"> • Target visitors that could also be remote workers

FIGURE 13: WHICH ENTITIES SUPPORT THE CUSTOMER GROUPS

	Competitive Projects	Existing Industry	Small Business	Entrepreneurs	Citizens	Remote Workers & Visitors
MBCIA						
Chamber						
NewTown						
Mercer Innovation Center						
Visit Macon						

Note: The chart above is an example of what a collaborative approach to economic development may look like.

The goal would be to develop ways to collaborate and use resources that support common goals. As part of the process, it will be important to define the core mission for each entity. The core mission helps provide clarity to which entities are better suited for implementing the strategy, while others may advocate or help facilitate.

TACTIC: Create a Delta Team.

MBCIA has a tremendous amount of success winning competitive projects that invest private capital in the community and create jobs. Various community leaders have been involved in the process over the years. There is a strength in having multiple entities such as Macon-Bibb County, the Macon Water Board and Industrial Authority all part of the process; however, change is inevitable, and this also becomes a threat without proper planning.

To broaden the base of players, it is recommended that MBCIA create a dedicated team, similar to a special strike force or what VisionFirst likes to call a Delta Team, to provide the necessary targeted support when decisions are being made regarding jobs or capital investment.

Knowing that projects are not won on a single visit, it should be understood not all Delta Team members will be included on every prospect visit. Members of the team should participate when they can add value to the issues being discussed. Communities that get this right far exceed prospect expectations and greatly increase their likelihood of success.

- Identify team members with skills and intellectual capital to address infrastructure, workforce, public services and business climate.
- Provide team member training on the importance of confidentiality and roles in the process.

- Utilize the group to analyze projects considered, won or lost to adjust and improve process.
- Understand that a title does not necessarily make you a member of the Delta Team.
- Utilize skills and abilities of team members to better position odds of winning competitive projects and improving overall community competitiveness.

TACTIC: Position MBCIA as a manager of real estate and trusted steward of public assets.

Other than board members, there was little recognition of the role MBCIA has for managing properties and assets of the authority. Success of industrial and aviation projects have been the result of the abilities of the authority to purchase, lease or sell land/buildings.

To provide further transparency and information to public stakeholders, an annual report should be created that reflects the MBCIA portfolio of property and its value proposition to the community. In addition to the 81 properties managed, the portfolio can reflect aggregated number of jobs, payroll and capital investment that is provided to the community. This report should also provide facts supporting the importance that the county own and manage its own properties through the authority.

TACTIC: Develop management plan for the Middle Georgia Regional Airport.

MBCIA has continued to have the foresight to purchase property around the Middle Georgia Regional Airport for future economic development opportunities. The biggest barrier to maximizing the community value of the airport is the lack of long-term strategy for development of the airport. The airport would greatly benefit from the oversight of a board like MBCIA.

There should be further investigation on a long-term management plan for the airport. To start a dialogue, the MBCIA board should work with the new mayor and create a task force to explore this option. The group should look at day-to-day operations, needed maintenance, current needs of employers there, opportunities for development, etc. The findings will start a dialogue to finding a long-term solution that identifies funding, objectives and oversight.

2. Improve & Expand Product Development

Core Strategy

Decision making in the modern world is based on data – and this strategy has been amplified due to the pandemic. Site selectors and location advisors use online resources to analyze a state, region or community's situation and forecast the economic health of an area and the impact of a competitive project for their client. Data from federal, state and local government agencies play a key role in where companies decide to invest their resources. As important as these resources are in an initial review, so is the community's online sites and buildings database and its supporting materials. Currently, MBCIA has 63 sites and buildings listed in the GIS web tech online portfolio.

While having the sites online is critical, it is important to continually evaluate the information presented along with how the product compares for the targeted industries the community is looking to recruit. Moving forward, MBCIA should consider tactics around product positioning and product development.

TACTIC: Increase online information and supporting documents for industrial properties.

MBCIA is fortunate to have representation of its sites and buildings in three online databases: [Macon-Bibb's GIS web recruitment page](#), [Georgia's Electric Membership Corporation](#) and the state of [Georgia's site selector property database](#) – this is a competitive advantage and offers the community increased exposure. Site selector searches typically begin by reviewing a larger geographic footprint before narrowing down to specific communities. Internal conversations with the MBCIA team detailed the amount of due diligence done before marketing each property, yet most of the properties' online presence fail to recognize and leverage these accomplishments.

Risk mitigation is a key factor for competitive projects. MBCIA should highlight all due diligence performed on each property, provide detailed property attributes regarding utility and transportation infrastructure and update attachments with recent aerial photography, supporting maps and executive summaries. Utilize *Figure 10: Competitive Property Checklist* to ensure information is consistent among all properties.

TACTIC: Increase visibility by combining parcels and master planning prominent industrial parks.

MBCIA's properties are limited to only four parcels that offer 100+ acres. However, by combining parcels and displaying a master plan for the prominent industrial park increases the community's chances of being considered for projects that require additional development and buffer zones.

Speed to market is often a top driver for competitive projects. Having a clear and comprehensive master plan gives a potential investor a conceptual layout to guide growth and development. Master planning is both an art and a science where planners have the unique ability to deliver a design in an integrated way. This is becoming more necessary as industrial properties are analyzed in detail.

The master planning process usually involves:

- Feasibility study: a review of property to determine available options for development. This includes if the site is suitable for an intended function by taking into consideration the financial, social and environmental aspects of intended land use.
- Strategic framework: establishes baseline information, such as the property location, boundaries and dimension, as well as topography and existing use or current zoning.
- Both the feasibility study and the strategic framework are used to develop the physical and spatial elements.

TACTIC: Augment available product using creative solutions for reuse of abandoned and vacant properties.

There is great potential in the utilization of the Macon Bright Program to reuse properties in the county to entice new private investment and create jobs. The availability of potential locations increases in a market already constrained by sites and buildings.

In recent years, abandoned retail space has been converted for health care, educational institutions and housing. Ecommerce growth prior to the pandemic has now soared exponentially creating a demand for space. Atlanta's proximity and the existing Macon Bright Program are great assets to position the county for ecommerce warehouse opportunities.

MBCIA should inventory these properties, determine which ones have the most potential and explore ways to entice interest from developers and end users.

TACTIC: Explore the development of regional mega site.

Given the lack of a local mega site, MBCIA should explore the development of a regional mega site with the Central Georgia Joint Development Authority. By partnering with surrounding counties and the development authority, the region has the potential to compete for large scale projects. As part of the initiative the Industrial Authority should consider a number of key features in picking a property as this is a large undertaking and expensive commitment for all parties.

Working with its partners, MBCIA must first determine the total acreage and identify the target industry the region wants to recruit and then develop the criteria around that industry. Some communities view 500-acres as a mega site, while more urban areas exceed

1,000-acres. Mega sites are typically as close to shovel ready as possible and are backed by a certified third party such as the GRAD program.

While not all mega sites are shovel ready because of the cost of extending transportation and utility infrastructure, prior to determining a property, it is important to fully understand the criteria that is required for site development. These criteria include investments and timelines for: utility infrastructure, transportation improvements, topography and grading and wetlands/environmental permitting. Generally, mega sites have easy access to high-volume roadways, rail and port infrastructure.

The speed at which large manufacturers have to make location decisions is becoming more and more compressed. Due diligence, as listed in Figure 10, helps reduce the risk and unanticipated holdups to keep a fast-tracked project moving forward and development costs down.

3. Identify & Market to Target Industries

Core Strategy

MBCIA serves as the lead agency for the attraction, retention and expansion of new business investments and improving the community's quality of place by creating a competitive business environment. Building a cohesive target industry strategy involves considering the county, region and state's values and desires, existing industry base, regional economic trends and forecasted industry trends.

Whether from the perspective of a site selector or a business decisionmaker, having target industries identified and listed on a community's website is a must. However, simply having targets listed is simply not enough. Industry executives and site selectors want to know why and how each industry would thrive in a region.

Having "manufacturing" or "tech" are often too broads as there are no NAICS codes specially assigned to those targets. Although those categories might serve a purpose for increasing search engine optimization and traffic to MBCIA's website, the organization would be better off narrowing their target industries. Ultimately resulting in MBCIA better highlighting area advantages and assets.

TACTIC: Reemphasize Georgia's competitive positioning to increase national and global investment.

In 2020, for the seventh consecutive year, Georgia was ranked the number one state in the nation for doing business – number one state for overall business costs – and number one workforce training programs by Area Development. The state's legislature has continually focused on lowering the cost to do business with incentive programs, reducing startup and operational costs, and providing credits for research and development investments.

Since the site selection process often begins at the state level, MBCIA should take advantage of Georgia's competitive advantage in all communication and marketing materials – particularly in its online presence. Specifically, a targeted industry page on MBCIA's website would increase awareness for prospects. Currently target sectors are listed under announcements and highlights – taking the viewer to an infographic PDF file. While these documents are a great start to defining the competitive advantage for specific industries, they are hard to find and do not appear to be meta-tagged with keywords that would increase search engine optimization.

In addition, the new presidential administration opens the doors for increased foreign direct investment opportunities. Highlighting and proactively marketing Georgia's strategic location, attractive and competitive business market with Macon-Bibb County's local and regional advantages to foreign markets should be a top priority.

TACTIC: Utilize robust existing industry program to drive business development.

MBCIA's leadership in directing an existing business recruitment and expansion (BR&E) is a key component of its business development efforts. A strong BR&E program not only identifies retention and expansion opportunities but provides critical feedback to support business recruitment. The county would be at a competitive disadvantage without a proactive effort.

A proactive effort would include setting a target of 50 leadership meetings per year. This would include not only local industry leadership but also those at corporate headquarters or decision-making locations given the ability to travel. The aggregation of the data provides opportunities for supply chain recruitment and feedback on doing business in Macon-Bibb County.

BR&E also provides a great opportunity to facilitate collaboration with other stakeholder organizations to address workforce and talent needs.

TACTIC: Develop value propositions for target industries.

MBCIA should work internally and with external partners to refine the target industries that best leverage community and regional assets. Regional and state assets such as the state's attractive business climate, workforce training program (Quick Start), global access through Hartsfield-Jackson Atlanta International Airport and Port of Savannah can help build off the data and research already conducted in this plan to further define and develop a value proposition to potential industry.

In addition to identifying targets, MBCIA should take into consideration trends and disruptions like the adaption of automation and artificial intelligence, changes in national and global politics and trade, reshoring, etc. In doing so, MBCIA must demonstrate how the region could offer competitive advantages to ensure the longevity of an industry.

Based on the location quotients and knowledge of the state and region, listed below are several target industries worth exploring and developing a value proposition.

- **Advanced Manufacturing** – Bibb County has seen a 2.1% average annual increase in manufacturing over the past five years, nearly double that state's average of 1.2%. However, defining a value proposition for manufacturing alone can be vague and not convey local and regional values. Several targets are forecasted for growth within the state and a few are listed below:
 - **Motor Vehicle (and Parts) Manufacturing:** Highlight Georgia's long history in automotive and its more than 200 automotive-related facilities and transportation access to move products both domestically and internationally. The region already employs nearly 2,000 in motor vehicle body and trailer manufacturing and has a LQ of

7.28, with competitive average annual wages (\$45,809) lower than the state's average (\$49,377).

- **Fabricated Metal Manufacturing:** Georgia's metal industry is a key supplier to automotive, aerospace, energy and construction equipment. As these key industries grow, so does the fabricated metal industry by expanding its employment and GSP to keep up with demand. Highlight the state and region's strong manufacturing and construction industries, metal fabrication training programs and well-developed R&D market.
- **Beverage and Food Manufacturing:** Highlight the region's extensive logistics and supply chain infrastructure. Leverage the Macon Water Authority (MWA) and its robust water and wastewater infrastructure, capacity and recent enhancements.
- **Finance and Insurance:** This sector is growing digitally because of the accelerated changes caused by the pandemic. Highlight the state's robust workforce pipeline with the nation's first FinTech Academy, which combines the 26 public institutions with over 100 companies to train employees for fintech, as well as cybersecurity. Highlight the state's low corporate tax rates, historically 6% for the past 50 years. Create ways to connect the industry to Mercer University for continued support of the cluster.
- **Transportation and Warehousing:** Macon-Bibb County has had great success in recent announcements due to its location. Continue to market the region's intersections of interstates 75 and 16 with drive-time maps with daily drive averages usually 10 hours. Include proximity to Atlanta MSA and Georgia Ports Authority in Savannah as well as rail access via Norfolk Southern and Georgia Central Railroad.
- **Aerospace Manufacturing/MRO** – Highlight the airport industrial sites with direct and indirect runway access, focusing on the site readiness aspect. Promote the runway extension and available acreage (owned by MBCIA) at the Middle Georgia Regional Airport and proposed completion date. Emphasize the two FAA airframe and power plant mechanics certifications in the region and the aerospace engineering programs throughout the southeast. Also, leverage talent from Robins Air Force Base and the recent announcement with Central Georgia Technical College to develop the Aviation Partnership.
- **Cybersecurity:** A growing target globally, highlight Georgia's [Cybersecurity EDGE](#) (Economic Differentiator for Georgia Enterprises) which provides approximately 1 million businesses with information and courses to increase cyber protection. Emphasize the state's eight universities that have Centers of Academic Excellence in Cyber Defense (CAE-CD). Georgia Tech's Institute for Information Security and Privacy hosts 200 researchers with nice labs – all dedicated to cybersecurity efforts for academia, industry and government. Leverage opportunities for downtown redevelopment to attract niche cybersecurity firms that often pay high wages and engage heavily in local education initiatives.

4. Increase Marketing & Communications Efforts

Enabling

The Macon-Bibb community is fortunate to have a long history of successful economic development dating back to the location of YKK in the 1970s. Since that time organizations, partners, roles and leaders have changed but the county continues to be known as a destination for business.

The COVID-19 pandemic abruptly stopped travel, but location decisions have continued, providing communities an unmatched opportunity to proactively reach out to site selectors and business decisionmakers. And as a result, many organizations have seen an increased project pipeline as companies look to mitigate the disruption of global supply chains. With both a new presidential administration and the possibility of additional CARES Act relief funding, companies will likely continue to evaluate existing locations while considering new projects that leverage tax advantages.

Given this changed landscape of economic development, organizations must improve and increase their marketing and communications to external customers. Equally important, is MBCIA's ability to continue to communicate messages of accountability, transparency and measured success to internal stakeholders.

MBCIA has taken an important first step in working with a marketing and communications professional to update the organization's brand and efforts. The documents and brochures on the site reflect a strong design sense and a good use of infographics, but there is an opportunity to do more. Today, economic development organizations have to appeal to a multitude of audiences each looking for unique content spoken directly to their needs.

To begin to best communicate to MBCIA's audiences, consider the following audience segmentation chart.

FIGURE 14: AUDIENCE SEGMENTATION

External Audiences	Internal Audiences
<ul style="list-style-type: none">• Executive-level Corporate C-Suite Decision Makers (US & International)• Site Location Consultants• Existing Industry• Industry and Economic Development Media• Companies engaged in International Trade	<ul style="list-style-type: none">• Local Elected Officials• Board Members• Economic Development Partners (Economic Development & State Partners: Inclusive of state economic development partners, workforce boards, state agencies and utility partners)• Community Organizations• Education & Workforce Partners• Local Media• Taxpayers

MBCIA should utilize audience segmentation to determine what messages should be conveyed, to whom and with the goal of what action. Specifically consider:

1. What do we want them to think?
2. What do we want them to do?

From there, key messages can be developed that will serve as the foundation to generating messaging and content. Compelling and meaningful messages are vital to successful economic development. The messages will be used in interviews, social media, presentations, web materials and other mediums. Developers, business owners and others want to be assured that their investment in the region will have broad support among local leaders, residents and key partners and consistent messaging offers that level of confidence. From an immediate need perspective consider the following tactics for improving communications and marketing efforts.

TACTIC: Improve MBCIA website and online presence.

Potential economic development projects often begin by considering states and defined geographic regions – including utility regions. Rarely, does a prospect, company or site selector have a specific community in mind. Economic development websites most valued by site selectors and business decision makers have a few things in common.

- They understand their audiences and speak to them in their own language.
- They are heavy on facts in bulleted format and light on filler.
- They provide relevant data in formats that users can download and manipulate themselves.
- They are fast, easy to find and easy to use.
- They have the right content, organized in a way that makes sense.
- They are current, visually attractive and regularly updated utilizing photos and infographics to highlight key pieces of information.
- The organization's contact information is clear and accessible.

When searching for Macon-Bibb economic development the first website within Google is the county's economic and community development department. While not under MBCIA's purview, it would be helpful if that site listed MBCIA. Currently, the "other partners" tab does not work. The site should direct prospects to MBCIA for assistance.

Beyond search engines, as MBCIA updates its site it should consider several areas for improvement.

- **Update & Reorganize Dropdown Menus:** Including the infographic menu items, the current website has three menus on the homepage. Consider narrowing down to a main menu that focuses on target industries, sites and buildings, why the community and workforce. A secondary menu could include – about the organization, newsroom,

transparency, jobs and initiatives. Contact information to a direct person should be listed on every page.

- **Incentives:** As noted earlier in the incentive review, MBCIA's website shows limited incentive and property information. In reevaluating the website consider adding detailed information about incentive programs and associated forms and criteria.
- **Target Industries:** The target industry pages should take significant steps to highlight location benefits and emphasize competitive advantages as compared to relying on the audience to interpret data into their own narrative. This ultimately increases MBCIA's online presence to provide a clear direction for potential prospects to learn more about the county and its many assets.
- **Sites & Buildings:** In addition to the recommendations made earlier in the plan, consider featuring specific sites outside of the database. Pique a visitor's interest by featuring an airport site on the aviation target industry page.
- **Workforce:** While communities have become better about featuring workforce on their websites, they are often listing basic demographic information and a listing of educational institutions. In a hypercompetitive market, organizations should highlight what business decisionmakers cannot find through online databases. MBCIA's website should demonstrate partnerships with educational and workforce partners along with industry. Give specific examples and timelines of how success was achieved – consider highlighting various degrees and certificate programs within target industries. In addition, each target industry page should also feature relevant workforce and education statistics.
- **Utilize Case Studies & Testimonials:** MBCIA has great features of success in its annual report. However, those stories need to be told throughout the website and during the course of the entire year. Testimonials should help a company understand the community behind the numbers. Include testimonials from business owners of all sizes on why they choose to live and work in Macon-Bibb County. Feature professionals that are passionate about the region and the type of industry thriving in the region. Use sidebars or callout boxes, with infographics and stats, on pages to convey more visual interest rather than having people scroll for content.
- **Newsroom:** Go beyond press releases and create a newsroom that features case studies, fact sheets, bios, presentations and more. Press releases often feel antiquated and with a diminishing traditional media its essential to use other avenues to tout success. Create a dashboard that notes metrics achieved and those the organization is pursuing. Include ROI case studies like the Irving example included earlier in the plan and share those with internal and external stakeholders. Also, link to transparency and accountability information noted in the next tactic. In addition, include the variety of pdf brochures and fact sheets currently found throughout the site in the newsroom.

TACTIC: Communicate a commitment to accountability and transparency to internal audiences.

In economic development, one must never lose sight of the fact that the residents and taxpayers are the ultimate beneficiaries of the work of MBCIA. And while MBCIA currently operates in compliance with all public records laws and practices, that has not always been the perception of the organization. It is time to further build trust with internal customers by demonstrating a steadfast and ongoing commitment to accountability and transparency. MBCIA should communicate with elected officials, business leadership, stakeholders and the public at-large about its efforts, progress and fiscal accountability regularly.

Consider developing a suite of messages for internal stakeholders about the organization's accountability practices and ultimate success. Key facts could include:

- Budget numbers and associated clean audits
- Board oversight
- Properties managed and ROI associated
- Projects announced – jobs created, capital investment, wage, total payroll and projected taxes to the community
- Project performance and protecting taxpayer dollars

Given the many organizations with a role in community and economic development, MBCIA is experiencing is a lack of recognition - who is MBCIA and of how does MBCIA benefit the county? To demonstrate a renewed commitment to accountability, consider developing a webpage entitled "Commitment to Transparency & Accountability" that would contain the following information about the organization:

- Enabling legislation
- Bylaws
- Listing of all board members including their names, titles and company
- All Board of Directors materials not protected by confidentiality statutes including agendas, minutes and reports
- All non-confidential publications and reports including studies, this assessment, annual reports and studies
- Listing of property owned or managed by MBCIA
- Budget documents
- Frequently asked questions and fact sheets
- Metrics of success and case studies

By providing this information publicly, MBCIA can engage community support while offering an understanding of its work.

5. Serve as an Advocate for Community Competitiveness

Enabling

The issue of workforce was a primary and almost overshadowing topic during stakeholder interviews. Without question, education and the development of robust talent pipeline is a critical factor in economic vitality and vibrancy. However, in the case of Macon-Bibb County the conversation is not about whether it is important but rather “who owns workforce.” To merely discuss education, workforce and talent development at the level of ownership is misguided and will fail to move the needle for residents who are seeking opportunities to raise their income and improve their long-term outcomes.

Beyond the conversation of who “owns” workforce is the ongoing and little understood impacts of the COVID-19 pandemic to current and future workers. COVID-19 has exposed the disparities of education more so than any other crisis especially in underserved communities – underscoring the need for a holistic approach to talent and workforce undertaken by multiple partners.

To be successful in diversifying and providing meaningful job experiences for residents, it is critical to design and advocate for systems that bring out the talent in everyone regardless of where they are in their current careers. Simply put, that is not merely an initiative to be launched by one entity but rather the creation of a seamless approach that involves multiple entities with varying roles.

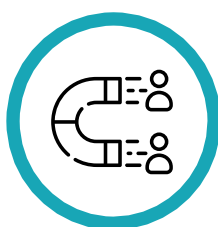
Understanding that the issue is vast, VisionFirst suggests segmenting talent into four categories: **development, attraction, retention and leadership**. Using these categories allows the community to identify and establish roles and metrics for success.



DEVELOPMENT



RETENTION



ATTRACTION



LEADERSHIP

Development: In considering workforce and education, development for the purpose of Macon-Bibb County relates to education and training in both the K-12 and higher education context. The community is both aware and, on a path, to improve educational outcomes at the K-12 level. Historically, the district has scored poorly on state accountability reports. In addition, COVID-19 has exasperated achievement gaps and challenges that already existed. Although MBCIA does not have a direct role in influencing the K-12 public school system, it

does play an important role in advocacy and serving as a conduit between K-12 education and potential and existing industry.

To build the pipeline, the Greater Macon-Bibb Chamber recently launched Greater Macon Works to promote available jobs and highlight available career pathways. As a business member organization, this initiative serves a great community purpose to align **current** job seeker and employer needs.

However, as it relates to competitive economic development project recruitment and expansion, development means aligning employer needs with workforce skills from a forward-looking perspective. In working with existing employers and prospects, MBCIA serves an advocacy role in K-12 education as well as the college and university level.

TACTIC: Coordinate with existing industry to identify and influence skill development. (*Mid-Term*)

MBCIA should survey existing employers on skill and occupation gaps and future projections regarding the impacts of automation and disruption. The data and feedback should then be shared with education and training providers. Given the community's poverty rate, MBCIA should advocate for training programs that are free and do not impact a person's current work schedule. Many employees do not pursue additional education or training due to the opportunity cost surrounding leaving their current employment.

According to a recent report by the Brookings Institute, "In a 2016 Pew Research survey, 35 percent of adults in the labor force said they did not currently have the education and training they need to get ahead. Among adults who cited needing more education or training to advance their careers, 57 percent said they could not take time off work to get additional training, and 45 percent said they didn't have access to or couldn't afford the additional education needed. Additionally, employer-paid worker training has been on the decline. In particular, Waddoups found a 28 percent decline in employer-paid training between 2001 and 2009."⁸

Consider the best practice from ST Aerospace below. This type of programming should be coordinated in conjunction with Central Georgia Technical College – the largest producer of degrees and certificates in the region – but also promoted in the early high school years so students are aware of the various local career pathways. But beyond coordination, MBCIA should advocate for increased promotion of programs to ensure underserved populations are aware of the opportunities and support services.

⁸ [The Brookings Institute: Preparing U.S. workers for the post-COVID economy.](#)

Best Practice: ST Aerospace, Pensacola

At its Maintenance, Repair, and Overhaul (MRO) facility in Pensacola, ST Engineering offers various trainings including the Airman Trainee Program, Structures and Interior Internships and the Military Fast Track program. Each program aims to develop a pipeline of talents to support the aviation sector and its facility. The people who participate in the programs have the opportunity to receive paid on-the-job training alongside with classroom lessons and the training program helps provide a strong head start for those interest in an aviation maintenance career.



Retention: The Macon-Bibb community is fortunate to have a robust education and workforce ecosystem with universities, state colleges and technical schools. However, during interviews it was noted there is little effort undertaken in retaining graduates from the various colleges and universities. Currently, Central Georgia Technical College, Mercer University, Middle Georgia State University, Wesleyan College and others are awarding more than 18,000 certificates and degrees annually in high-demand industries such as engineering, law, accounting, information technology, welding, computer sciences and aviation/airway management and operations. Assets such as the Mercer Innovation Center which is creating a culture of entrepreneurship along with NewTown Macon's Entrepreneur's Academy are creating a pipeline of talent that should be leveraged and retained.

In addition, retention of existing talent is always a concern among employers especially as the Industrial Authority seeks to bring new companies to the region. Pre-COVID-19 most communities were facing near full employment of residents who wanted to work. Employee turnover can result in high-costs and reduced productivity and potentially lower quality work as employees seek to make up the gap.

In comparing Macon-Bibb County's turnover rates to the state, the county has higher turnover in several target industries. As prospects meet with existing employers, this topic will likely be mentioned, and the Industrial Authority needs to be able to respond to these concerns.

FIGURE 15: TURNOVER RATES IN TOP INDUSTRIES COUNTY VS. STATE

NAICS	Industry	Employment	New Hires	Separations	Turnover	Average Annual Earnings
31	Manufacturing (Bibb)	6,000	690	890	7.60%	\$57,783
48	Transportation and Warehousing (Bibb)	3,069	562	477	9.50%	\$43,620
51	Information (Bibb)	904	118	195	13.20%	\$53,035
52	Finance & Insurance (Bibb)	7,997	442	508	4.60%	\$59,642
	Total - All Industries (Macon)	82,433	13,006	14,334	9.20%	\$47,183
31	Manufacturing (Georgia)	406,630	45,768	49,631	7.0%	\$60,719
48	Transportation and Warehousing (Georgia)	237,055	42,714	44,110	9.40%	\$61,760
51	Information	117,689	21,981	27,765	9.20%	\$96,428
52	Finance & Insurance (Georgia)	169,694	14,407	14,832	6.30%	\$96,818
	Total - All Industries (Georgia)	4,472,529	822,969	898,301	10.1%	\$56,085

TACTIC: Host an annual workforce roundtable with existing employers. To build on the feedback and data collected, VisionFirst recommends hosting an annual workforce summit to hear from existing employers. MBCIA should also invite workforce and education officials - not to participate in the conversation but to listen along with economic development and Chamber staff as a way to determine future partnerships and efforts. The summit would have three main goals:

1. Provide a clear overview of the county and regional economy and existing retention trends which will facilitate a candid conversation regarding the available workforce and talent opportunities and challenges.
2. Gain insight from business, education and workforce leaders through a facilitated conversation; share a summary of insights and ideas from the meeting with participants.
3. Use information to inform future initiatives with partners as appropriate.

Attraction: Workforce attraction has always been a competitive issue for counties and communities of all sizes. With COVID-19 the competition has intensified with small and mid-size communities looking to attract remote and skilled workers from congested and expensive markets.

TACTIC: Partner with NewTown Macon and the Chamber to demonstrate the community amenities and local talent demands is a first step in attraction. Given its proximity to more congested markets but easy access to transportation, Macon-Bibb County can continue to attract talent from surrounding Georgia communities such as Atlanta. Investments in infrastructure and the development of a mega site could spur interest in the community and give recent graduates of higher educational institutions along with exiting military members a reason to stay.

TACTIC: Promote the increase in educational attainment levels over the last eight years (Figure 12) in marketing materials. Often times, companies, executives and skilled talent want to know they are in a community that values education.

FIGURE 16: EDUCATIONAL ATTAINMENT, AGES 25-64

	2010	2011	2012	2013	2014	2015	2016	2017	2018
No HS Diploma	16.0%	15.8%	15.3%	15.4%	15.0%	14.3%	12.9%	12.1%	11.5%
High School Graduate	30.5%	31.4%	31.4%	31.4%	31.6%	31.8%	31.8%	31.5%	31.2%
Some College, No Degree	21.7%	21.6%	22.4%	22.8%	22.6%	22.9%	22.7%	23.0%	23.2%
Associate Degree	7.2%	7.1%	6.9%	7.0%	6.4%	6.3%	7.1%	6.9%	7.4%
Bachelor's Degree	16.4%	15.8%	15.7%	15.1%	15.4%	15.2%	15.5%	15.9%	16.2%
Postgraduate Degree	8.3%	8.4%	8.3%	8.3%	8.8%	9.4%	10.0%	10.6%	10.5%

Leadership: In the past, a community could increase its competitiveness by having a certified site and a location with access to infrastructure. Today, workforce is a critical driver of site location and the ability for a community to successfully demonstrate its workforce for today and tomorrow. While communities may be able to demonstrate the current programs and initiatives surrounding workforce, equally important is the ability to offer continued training to meet industry demands. MBCIA serves an important advocacy and leadership role throughout the workforce system.

TACTIC: Consider workforce an economic development product similar to incentives or sites. Success in economic development means continuing to access the market and adjusting the program of work to reflect the situation and anticipate future changes – this is especially true for MBCIA. It cannot simply turn over education to another entity to handle. As mentioned before all partners must work together seamlessly to both recruit industry and provide opportunities for residents. To ensure workforce development stays at the forefront of the organization, MBCIA should:

- Make workforce a key agenda item for each board meeting as a strategic discussion. This would include inviting skills providers to attend and present at board meetings.
- Review workforce programs, progress, skills gaps and statistics in each board meeting.
- Invite the education leaders to attend and present at board meetings to better understand how to support efforts and initiatives.

TACTIC: Advocate for additional expansion of high-speed internet. COVID-19 has accelerated the remote work experience. And with remote work and automation comes the assumption that workers will have access to the technological tools needed for training and skill development. But without expanded broadband access even more communities will be left behind.

According to the Bureau of Labor Statistics, in September 2020, 23% of employed people teleworked because of the pandemic. At the same time, Global Workplace Analytics estimates that 56% of the U.S. workforce holds a job that is compatible with remote work. The organization estimates that by the end of 2021, 25 to 30% of the workforce will be working from home multiple days a week.

MBCIA should continue to advocate for additional expansion of high-speed internet. The issue is not whether internet is available but rather if it is accessible and affordable.

Moving Forward

Macon-Bibb County is a thriving community with numerous assets and opportunities for its citizens. The MBCIA professional staff and board are highly effective and have proven that through numerous competitive project locations over multiple decades. At the same time, global competition for jobs, the impact of a global pandemic and public accountability requires adjustments to continue this success. This strategic plan builds off those accomplishments and lays a pathway to the future.

The practice of economic development today is an often-debated topic. While the process of economic development may be the same, the approach and metrics have changed dramatically, even for successful organizations like MBCIA.

A dichotomy exists between transparency and confidentiality with public organizations. Today, more so than ever, economic development organizations struggle with providing necessary confidentiality to protect potential prospects and at the same time provide necessary transparency to the public on its progress.

Moving forward it is important for MBCIA to strive to be a high-performing organization, implementing its strategic plan while protecting the privacy of its clients, while at the same time providing transparency to the public to emphasize its value proposition to the community. There is no doubt that the amount of capital investment and payroll resulted from the MBCIA's efforts have and will continue to positively impact the middle Georgia region. Communicating these results will go a long way in building the trust and support needed for sustaining these efforts.

Lastly, this strategic plan provided a starting point for the investors in economic development to build a framework for working cohesively together for a common goal. One of Macon-Bibb County's greatest strengths is the number of entities that contribute to a holistic economic development strategy; however, it is also its greatest weakness if there is no collaboration.

In the words of Margaret Mead, "Never doubt that a small group of thoughtful, committed, citizens can change the world. Indeed, it is the only thing that ever has." By implementing this plan, MBCIA is not only elevating its performance and accountability, but laying the groundwork for a collaborative approach to economic development, optimizing the resources of the region.