Comprehensive Economic Development Strategies (CEDS)

2018 - 2022

September 2017

5075 Research Drive NW, Huntsville, AL 35805
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Top of Alabama Regional Council of Governments

Comprehensive Economic Development Strategy

2018 - 2022

This report constitutes the Comprehensive Economic Development Strategy for the Top of Alabama Economic Development District for the period from 2018 to 2022

Adopted: September 26, 2017

For more information:
Top of Alabama Regional Council of Governments
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Huntsville, Alabama 35805
(o) 256-830-0843 - (f) 256-830-0843 - (w) tarcog.us

This report was prepared by the Top of Alabama Regional Council of Governments with the support of the United States Economic Development Administration.
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About TARCOG

Established by a local initiative in 1968, the Top of Alabama Regional Council of Governments (TARCOG) aims to identify and address common regional issues, opportunities, and challenges of Northeast Alabama’s municipalities and counties. TARCOG serves as Sub-State Planning District Twelve and the Area Agency on Aging. The governments of five northeast Alabama counties, DeKalb, Jackson, Limestone, Madison, and Marshall, and the municipalities located in these counties make up TARCOG. TARCOG helps local governments by obtaining funding for local government assistance, coordinating local governments’ responses to regional issues, and providing a wide range of services to the region’s governments and residents. This document was prepared and designed by the TARCOG Department of Planning and Economic Development.

Top of Alabama Regional Council of Governments
Department of Planning and Economic Development

Ms. Nancy Robertson.................................................................Executive Director
Mr. Lucas Z. Blankenship........Director of Economic Development & Regional Planning
Mr. D. C. Schafer.................................................................Economic Development Specialist
Ms. Falguni Patel.................................................................Principal Planner
Mr. Scott Griess.................................................................Associate Planner
CEDS Resolution

RESOLUTION NO. 17-29

A RESOLUTION AUTHORIZING ADOPTION OF TARCOG’S REVISED 2018-2022 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) AS THE STRATEGIC PLANNING ELEMENT FOR TARCOG’S ECONOMIC DEVELOPMENT DISTRICT (EDD)

WHEREAS, the Top of Alabama Regional Council of Governments is designated as the Economic Development District (EDD) for DeKalb, Jackson, Limestone, Madison, and Marshall Counties as authorized by Section 301 (b) of the Public Works and Economic Development Act of 1965; and

WHEREAS, the U. S. Department of Commerce through the Economic Development Administration (EDA) provides grant assistance to authorized EDD's in support of their regional development activities, and, this five year revised EDA CEDS is based upon the latest U.S. Department of Commerce EDA guidelines; and

WHEREAS, U. S. Department of Commerce EDA's CEDS process requires a revision of the CEDS Strategic Plan element based upon wide ranging community stakeholder inputs, partnerships, and multi-agency state and federal involvement and coordination, every five years; and

WHEREAS, TARCOG’s CEDS has been so revised for the period of 2018-2022, and published for review, and comments; and

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors of the Top of Alabama Regional Council of Governments, acting jointly as and on behalf of, the EDD membership, does hereby certify and authorize the EDD’s revised 2018-2022 CEDS, and adopt it as its Strategic Planning Element.

RESOLVED THIS 26th DAY OF SEPTEMBER, 2017

BY: TOP OF ALABAMA REGIONAL COUNCIL OF GOVERNMENTS

[Signature]

James O’Neal, President
Top of Alabama Regional Council of Governments
5075 Research Drive NW · Huntsville, AL 35805
Telephone (256) 830-0818 · Fax (256) 830-0843

September 26, 2017

Mr. H. Philip Paradice, Jr., Regional Director
U. S. Department of Commerce
Economic Development Administration
Suite 1820 401 West Peachtree Street, N. W.
Atlanta, GA 30308-3510

Re: Annual 2017 CEDS Update and CEDS Certification
Attn: Lee Mertins

Dear Mr. Paradice:

The Board of Directors of The Top of Alabama Regional Council of Governments (TARCOG) and Economic Development District (EDD,) representing the Counties of DeKalb, Jackson, Limestone, Madison, and Marshall, have met in session and passed a resolution (copy attached) authorizing its President to act on their behalf in endorsing the District's attached 2017 Update and ongoing evaluation of changing issues, and progress towards achieving the objectives of our 2018-2022 Comprehensive Economic Development Strategy (CEDS.)

The five County Commissions, member governments, the private sector, and special interest groups have been, and are, active members of TARCOG its EDD, and as such, support its CEDS. The present CEDS, and its 2017 Update represent a well prepared program for the TARCOG area and is representative of the diversity of our District.

The CEDS, as currently updated, reflects a dynamic process, based on the long term development potentials, goals and guidelines for the five member EDD counties. On behalf of DeKalb, Jackson, Limestone, Madison, and Marshall Counties, we herewith endorse and support the CEDS and its process as a vital planning tool and action guideline for the TARCOG EDD.

If I may be of further assistance, please feel free to contact me.

Sincerely,

James O'Neal, President
Top of Alabama Regional Council of Governments and Economic Development District

Enclosure
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Introduction

This Comprehensive Economic Development Strategy (CEDS) is the result of a regional economic development planning process. The information contained in this report summarizes the strengths, weaknesses, opportunities and threats facing the five (5) county region served by the top of Alabama Regional Council of Governments (TARCOG). Goals and strategies have been developed from this process; implementation, projects and activities will be monitored to ensure progress is made in working toward and accomplishing these goals. Ultimately, this process will help promote the creation of jobs, a more stable and diversified local and regional economy, and improved living conditions and quality of life for the citizens of the region.

The following remarks were made by Mr. Lucas Z. Blankenship, Chairman of the CEDS Strategy Committee.

*I am committed to the total success of this committee’s mission and subscribe to the philosophy “Change is inevitable but progress is truly optional. Tomorrow’s outcome for our region is dependent upon how we act today to create the outcomes we desire for our community.” I am dedicated and committed to the task and am passionate about economic development in our region. I have much to learn and solicit your patience and support along the way.*

The Top of Alabama Region offers virtually unlimited opportunity to become the heart of economic development in Alabama and can, I believe, become a model for the southeast. Some reasons that the five county area of DeKalb, Jackson, Limestone Madison and Marshall is postured to lead the change:

- Existing highways (I-65, I-565, I-59, 72, 75, 35, 231, and 431) offer enviable mobility throughout the five county area with excellent connectivity to the nation’s interstate system. The navigable Tennessee River with Port Facility, the Huntsville International and Intermodal air passenger and cargo and east-west and north-south railways are reasonably accessible from throughout the area. Multiple local airports dispersed and bracketing the area are huge assets.

- Open and minimally encumbered land exists which must be capitalized on.

- Abundant electric power and natural gas embrace the area. Existing and planned City and County water and wastewater systems serve extensively as the foundation for extension and interconnection to accommodate development.

- A population shift to our region is occurring. From 2000 to 2010, Madison County and the five surrounding counties experienced the highest percentage of the State’s total population growth (27.65% population increase / 91,963 persons). This suggests response to the attractiveness of our area resulting in an increased workforce.

- Military Base Realignment and Closure (BRAC) continues to result in significant population gain for North Alabama. It is anticipated that many of these relocated employees will move to our region which is within easy commute to Redstone Arsenal. Also, we can expect an influx of construction activity to accommodate the functional relocation. Additional complementary and supporting industry is anticipated.

- Education opportunities are abundant with outstanding 2-year colleges (Calhoun, Snead, Northeast) bracketing the area. Five 4-year colleges (UAH, Athens State, Alabama A&M, UNA and Oakwood) are reasonably close. With continued and increased emphasis on workforce development and by maximizing the involvement of these institutions as well as our excellent city and county schools, this area can produce an educated workforce unequalled in the state.
High-tech industry generated by NASA, Redstone Arsenal and HudsonAlpha Institute for Biotechnology posture North Alabama for related expansion and spin-off. We must exploit these sectors to include aerospace, aviation, life sciences and research and development companies while simultaneously maintaining focus on automotive and other manufacturing industries and suppliers.

Not to be overlooked is the “tourism industry”. Our region is stepped in history and natural beauty. It offers attractions, which can be cumulatively leveraged as a destination attraction.

To this point, my comments have been primarily industry oriented. This was not meant to exclude retail development. However, I see industry, which offers extensive employment with good paying jobs, as a major driver in support and growth of retail development. Retail development is typically community oriented whereas major industrial development is best maximized through regional teamwork. DeKalb, Jackson, Limestone, Madison and Marshall Counties are visibly on the move. Success stories are numerous. Cummings Research Park in Huntsville and the Limestone County Greenbrier Industrial Development Site are model examples of what can be accomplished through leadership, vision and teamwork. Teamwork and unity through a coalition of governing bodies presents a compelling case for federal and state financial support and sends a reverberating message throughout industry. I maintain that the TARCOG region with its many assets has the leadership and vision that can set the course for the area to achieve continued excellence. To accomplish this we must remain focused while exercising objectivity, common sense and selflessness. All will ultimately benefit.

Thank you.

Lucas Z. Blankenship
Director of Economic Development and Regional Planning
Top of Alabama Regional Council of Government

Purpose

The purpose of this Comprehensive Economic Development Strategy is to plan a coordinated approach to the economic development of the District. More broadly, its purpose is to promote the overall economic prosperity of the area and its people while assuring the livability of its communities and the enduring quality of the environment that is so valued by the people who live here. More specifically, the purposes of this Strategy are to:

a) Bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen the regional economy and facilitate networks for partnership;

b) Relate the District’s initiatives to the distinct competitive advantages that make it attractive for business, industrial growth, and retention;

c) Work together to leverage the regional strengths and resources in a holistic manner to maximize economic opportunities that would benefit the entire District;

d) Define the role of the District in encouraging job retention, growth, and economic prosperity, particularly in relation to the broadening of job opportunities, stimulating private investment, and balancing the regional economy; and
e) Foster a regional identity to not only encourage greater economic opportunity, but to strengthen community and commitment to place.

The District contains an urban core and rural communities whose economies are inextricably linked. Traditionally, those rural economies were largely based on resource-dependent industries, such as agriculture, forestry, or energy production. This Comprehensive Economic Development Strategy serves to maximize those inherent competitive strengths to enhance local, regional, national, and global connections. Economies cross jurisdictional boundaries and connect rural and urban communities. Connecting our region by fostering meaningful, value-added partnerships that link industry, education and leadership will build on our regional innovation capacity and help strengthen local economies. Looked at as part of a broader, synergistic and dynamic system of processes, regional economic development strategies can help position our District toward sustained prosperity now and into the future. This Comprehensive Economic Development Strategy is about connecting and strengthening the civic, built, and natural infrastructure within the District to help support the diversification, adaptability, and resiliency of our local economies.

A Five Step Process

The process used in the preparation of this Comprehensive Economic Development Strategy is typical of a planning process used for most types of comprehensive or strategic planning. The process is aligned with the guidelines published by EDA. Taken as a whole, it is a six step process that involves:

- Understanding Our Background, that is, the economic development situation of the District. This information can be found in Chapter Two;
- Examining Our Opportunities, including an analysis of the District’s assets and challenges, as well as other forces affecting the local economy. This analysis can be found in Chapter Three;
- Defining Our Expectations, involving the development of an overall vision for the District along with goals and objectives for the realization of that vision. The goals for the District are at the heart of this strategy and can be found in Chapter Four;
- Formulating Our Strategy, to include strategic projects, programs and activities within a selection of overarching themes for economic development success. Strategic Projects, Programs and Activities are found in Chapter Three;
- Planning Our Activities that will serve to act upon the strategy and expectations within the structure of a manageable District work program. This work program is found in Chapter Four; and
- Measuring Our Success, in order to regularly evaluate the development and implementation of this Comprehensive Economic Development Strategy. This is also found in Chapter Five.
Community and Private Sector Participation

The development and implementation of the CEDS is an ongoing process. Since the CEDS, and economic development activities undertaken pursuant to the CEDS, are coordinated by TARCOG, the staff of TARCOG reports to its Board of Directors regarding such activities on a regular monthly basis. The Board of Directors of TARCOG also serves as the Strategy Committee for the preparation of the CEDS and for the annual update reports that are submitted to EDA. The Board of Directors/Strategy Committee consists of thirty members representing all five counties within the District. The members represent a wide range of community interests including local governments, area colleges, chambers of commerce, private sector businesses and industries, and individual citizens. A list of the members of TARCOG’s Board of Directors is contained in the Appendices.

In the preparation of this CEDS, a special ad hoc advisory group was assembled to obtain additional insight into the District’s economic development situation and opportunities. This Advisory Group included persons from the fields of agriculture, commerce, education and workforce development, local government, industrial development, science and technology, transportation, and communications, and met regularly through the Summer of 2017. In addition to Advisory Group meetings, the staff of TARCOG distributed survey forms to the Board of Directors, the Advisory Group, every local government within the District, local residents and interested members of the community in order to obtain even more input into the preparation of this CEDS.

Organizing and Staffing for Economic Development

The Top of Alabama Regional Council of Governments (TARCOG) was created in 1968 under Legislative Act 112, and is one of twelve Councils of Governments (COGS) in the State of Alabama. TARCOG’s Board of Directors consists of representatives from participating member Governments within the region and serves a five-county region consisting of the aforementioned counties and approximately 46 total municipalities.

TARCOG continues to provide leadership for the preparation of the region’s annual Comprehensive Economic Development Strategy (CEDS) as required by the U.S. Department of Commerce Economic Development Administration to qualify for its assistance programs. The first of three meetings were held in June 2017, and the final two meetings held in July and August 2017. The purpose of these meetings was to provide guidance, oversight, and input into the CEDS planning process, a SWOT (strengths, weaknesses, opportunities and threats) review and analysis, goal setting and project review and update. Input from these meetings was
included in this 2018 CEDS document which was then submitted for a thirty day public review and comment period. Ultimately, this document represents TARCOG’s effort to provide a Comprehensive Economic Development Strategy (CEDS) for our five-county region.

**CEDS Strategy Committee**

The CEDS Strategy Committee, the entity identified by TARCOG as responsible for developing, updating, or replacing a strategy, is the principal facilitator of the economic development planning and implementation process. Its members represent all major interests within the TARCOG region in an effort to ensure that viewpoints of all components of the community were considered and to take advantage of local skills and resources in program formulation and implementation. The following individuals served on the 2018-2022 TARCOG CEDS Strategy Committee established to oversee the CEDS process:

**Agriculture**

- Shirley Schofield – Executive Director, Food Bank of North Alabama
- Mike Roden – Executive Director, Alabama Mountains Rivers Valleys RC&D Council
- Brian Yarbrough – Executive Director, U.S.D.A. Rural Development Huntsville District Office
- Lupe Kirby – Field Coordinator, U.S.D.A. Rural Development Anniston District
- Sam Sandlin – Executive Director, Madison County Soil & Water Conservation District
- Shawn Manning – Executive Director, Marshall County Soil & Water Conservation District
Commerce

- Chip Cherry – Executive Director, Chamber of Commerce of Huntsville/Madison County
- Rick Roden – Executive Director, Greater Jackson County Chamber of Commerce
- Carol Beddingfield – Executive Director, Fort Payne Chamber of Commerce
- Jennifer Williamson – Executive Director, Greater Limestone County Chamber
- Wes Kitchens – Executive Director, Arab Chamber of Commerce

Education and Workforce Development

- Lucia Cape – Senior Vice President, Economic Development/Workforce, Chamber of Commerce of Huntsville/Madison County
- Nancy Griggs – Workforce Development Officer, Northeast Alabama Community College
- Vincent Vincent – Workforce Development Officer, Calhoun Community College
- John Holley - Workforce Development Officer, Calhoun Community College
- Cherri Barnard - Workforce Development Officer,
- Snead State Community College

Industry

- Shelia Shepard – Executive Director, Jackson County Economic Development Authority
- Pam Clay & Diana Goss – Economic Development Specialists, DeKalb County Economic Development Authority
- Matt Arnold – Executive Director, Marshall County Economic Development Authority
- Brooks Kracke – President, North Alabama Industrial Development Association

Research and Development

- Jeff Thompson – Executive Director of Alabama Aerospace Ind. Association, University of Alabama in Huntsville
- Carter Wells – Vice President of Economic Development, HudsonAlpha Institute for Biotechnology
- Amy Sturdivant – Economic Development Specialist, HudsonAlpha Institute for Biotechnology

Tourism

- Tami Reist – Executive Director, Alabama Mountain Lakes Tourist Association
- Judy Ryals – President, Huntsville/Madison County Convention & Visitors Bureau
- John Dersham – Executive Director, DeKalb County Tourism Office
- Morri Yancy – President, Lake Guntersville Chamber of Commerce

Transportation

- Rick Tucker – Executive Director, Huntsville-Madison County Airport Authority
- Curtis Vincent / Les Hopson / Rod Ellis / Allen Teague, Alabama Department of Transportation Regional Engineering
- James Moore / Paige Colburn - Huntsville Area MPO Planning Department
• Bryant Moss – Engineer, Limestone County Department of Engineering
• Robert Pirando – Engineer, Marshall County Engineering Office

Utilities
• Lauren Vandiver – Government Relations Manager, Tennessee Valley Authority
• Daryl Williamson – Executive Director, Limestone County Water & Sewer Authority
• Dus Rogers – Customer Service 7 Utilities Manager, Farmers Telecommunications

Working Partnerships

The TARCOG and CEDS Strategy Committee recognizes the importance of defining its role and relationships with existing local, regional and state institutions for the enhancement of local and regional economic development planning efforts and implementation. Individuals representing some of these institutions have provided leadership and guidance in the early development of this year’s CEDS process. These institutions include, but are not limited to, the Alabama Department of Commerce, Economic Development Partnership of Alabama, Tennessee Valley Authority, DeKalb County Economic Development Authority, Jackson County Economic Development Authority, Limestone County Economic Development Association, Huntsville / Madison County Chamber of Commerce, Marshall County Economic Development Council and North Alabama Industrial Development Association.

Committee Work Program

The work program provides the agenda for the work of the Strategy Committee and identifies tasks to be performed, determines who is responsible for each task and develops a time table for each task. The Strategy Committee communicated with TARCOG staff between meetings and other times in order to provide significant input for inclusion.
Staff Support

The Strategy Committee frequently requires the involvement of many individuals, especially the staff of TARCOG, to provide support and input including collecting and analyzing information on the area’s economy, identifying strategy options, preparing implementation plans, and preparing the final CEDS document for submission to U.S. EDA.
Analysis: Where Are We?

Demographic Characteristics

The population of the TARCOG region has increased by 16.9% from 2000 to 2010; current (2016) estimates place its growth at an additional 5.2% since 2010. From 2010-2016, the individual counties’ populations increased, with the exception of in DeKalb and Jackson County, which saw reductions of 0.3%, and 2.0% respectively. Over the same time, the State of Alabama experienced a population growth of only 1.7%, while the United States grew by about 4.7%. Madison County continued to have the highest total population, but, as from 2000-2010, still did not have the greatest proportional population increase over the period. As from 2000-2010, Limestone County captured this honor, with a population increase rate of an impressive 12.0%. A significant indicator of the region’s rising position in the state’s economy, is the fact that from 2010-2016, driven by Limestone and Madison County’s figures, the total estimated increased population in the TARCOG region accounted for 40% of the State’s total estimated population increase.

<table>
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<tr>
<th>AREA</th>
<th>CENSUS 2010</th>
<th>2011</th>
<th>2012</th>
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Median Age

Like elsewhere in the country, the counties within the TARCOG continue to experience an increasingly aging population. As was noted in the above section, the population of DeKalb and Jackson County declined from 2010 to 2016. When this is combined with their District leading relative increases in median age, it is clear that it is younger populations who have been leaving the two Counties.
Madison County, with its influx of young-to-middle aged workers over the period, had the Region’s lowest median age, and the lowest aging growth rate; and, from 2000 to 2016, the median age of the United States has increased steadily, but at a declining rate, from 35.3 to 37.6; and the state of Alabama, similarly, from 35.8 to 38.4.

As a caveat to defining the multi-faceted significance of “aging” related statistics, using 2010 Census data as a base, and projections out to 2040, TARCOG’s population aged 65 and over, is projected to increase by 103.5%, significantly outpacing state-wide growth for the period, and increasing the region’s share of the aged 65+ population from 12.7% in 2010, to 18.2% of the state’s total persons aged 65+ by 2040.

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<tr>
<th>AREA</th>
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Source: U.S. Census Bureau & American Community Survey Data

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<tr>
<th>AREA</th>
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<th>2035</th>
<th>2040</th>
<th>#/ % CHANGE</th>
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<td>12,808</td>
<td>13,014</td>
<td>4,241/48.3</td>
</tr>
<tr>
<td>LIMESTONE</td>
<td>10,187</td>
<td>12,973</td>
<td>19,704</td>
<td>27,168</td>
<td>30,039</td>
<td>19,852/194.9</td>
</tr>
<tr>
<td>MADISON</td>
<td>40,873</td>
<td>49,579</td>
<td>68,356</td>
<td>89,327</td>
<td>93,438</td>
<td>52,565/128.6</td>
</tr>
<tr>
<td>MARSHALL</td>
<td>13,862</td>
<td>15,749</td>
<td>18,024</td>
<td>19,806</td>
<td>20,041</td>
<td>6,179/44.6</td>
</tr>
<tr>
<td>TARCOG</td>
<td>83,570</td>
<td>99,666</td>
<td>130,681</td>
<td>162,497</td>
<td>170,038</td>
<td>86,468/103.5</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau and University of Alabama CBER, July 2016.
Population Density

Along with a vast population growth, the TARCOG region has seen an increase in population density. Population density continues to vary greatly within the District, ranging from almost 450 persons per square mile in Madison County to less than 50 in Jackson County. Locally, the difference is even greater. With the bulk of the District population growth being in Madison and Limestone counties, obviously, the greatest increase in population density is in those counties as well - leading to ongoing concerns for more, and better general and infrastructure planning needs.

An additional factor, related to density, affecting the area, and its planning and growth ability, is the mix of urbanization/municipality growth and rural/unincorporated area growth. Obviously, municipalities have the highest potential for providing services and infrastructure, based on economies of scale, and tax base.

The table on the next page illustrates the fact that, In the TARCOG Region, since the 2010 Census, the population residing in the unincorporated areas has averaged 43%, ranging from a high of 64% in Madison County’s neighboring in-commuting County, Limestone, to about 32% for Madison County.

The high percentage of persons residing outside incorporated places, in an environment lacking police and planning jurisdiction, makes planning and enforcing zoning and progressive code structures highly difficult; and, it places infrastructure planning and the obtaining of necessary fiscal resources, at the county government level, which in most cases, is the area with the most constrained, and highly limited revenue stream.

| TARCOG REGION POPULATION DENSITY (PERSONS PER SQUARE MILE) 2000 - 2010 - 2016 |
|-----------------|-----|-----|-----------------|-----|-----------------|
| AREA            | 2000| 2010| 2000-2010 % CHANGE | 2016| 2010-2016 % CHANGE |
| DEKALB          | 82.9| 91.5| 10.4            | 91.2| -.27            |
| JACKSON         | 50.0| 49.4| -1.20           | 48.4| -2.0            |
| LIMESTONE       | 115.6| 147.8| 27.90          | 165.6| 12.06          |
| MADISON         | 343.8| 417.7| 21.20          | 445.1| 6.56           |
| MARSHALL        | 145 | 164.4| 13.40          | 168.1| 2.26           |

Source: U.S. Census Bureau and current ACS Data
Socioeconomic Characteristics

Average Compensation/Wages per Job

Total Average Compensation/Wage per Job is the sum of wage and salary disbursements and supplements to income, divided by total part-time and full-time employment. It measures the average compensation per job in the study area, regardless of the distribution of income among earners in different jobs or in full-time or part-time positions. It is useful as an unrefined measure of job quality.

Using BEA figures, based on NAICS Industrial Classification Codes, the average compensation per job for TARCOG District counties was taken from 2010 and 2015, representing a five year period, similar to a CEDS planning period (and with 2015 being the latest BEA detailed wage/salary figures available.) Of the five counties within the TARCOG District, Limestone County represented the greatest change in both compensation per job and annual average jobs within the period. DeKalb County had the lowest annual average employment/jobs growth; Jackson County had the lowest growth in its average annual wages. DeKalb’s 2015 average annual wage figure of $34,058 was lowest; with, not surprisingly, Madison County’s average wage figure of $55,890 being the highest.

Detailed State/County Workforce Sector Statistics for TARCOG for the most recent year (2015) indicated a total regional employment of 283,297, with Madison County accounting for 66.4% of all regional employment. Manufacturing employment provides 16.4% of the region-wide jobs, ranging from a high of 33.0% of total jobs, and 38.5% of total annual wages, in Jackson County, to a low of 10.7% of jobs, and 13.5% of total wages, in Madison County. Average annual manufacturing wages range from a high of just over $71,000 in Madison County, to a low of $37,400 in Marshall County. Overall, the region saw an increase in average compensation per job of 8.2%, with the regional average annual wage figures increasing from $45,651 to $49,394. This is compared to a 3.7% increase in average wages/salary compensation per job for the entire state of Alabama for the same period.

The above sectors have established the base magnitudes of income and employment indexes to the area and its industries, however another important index is how these figures and their distribution relate to socioeconomic “well-being” characteristics, such as poverty.
## TARCOC REGIONAL POVERTY % DATA 2017

<table>
<thead>
<tr>
<th></th>
<th>DEKALB</th>
<th>JACKSON</th>
<th>LIMESTONE</th>
<th>MADISON</th>
<th>MARSHALL</th>
<th>AL</th>
<th>USA</th>
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<tbody>
<tr>
<td><strong>POPULATION</strong></td>
<td>70,900</td>
<td>52,138</td>
<td>92,753</td>
<td>356,957</td>
<td>95,157</td>
<td>4,863,300</td>
<td>323,127,513</td>
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<tr>
<td><strong>POVERTY</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ALL PERSONS</strong></td>
<td>20.5</td>
<td>18.4</td>
<td>14.3</td>
<td>13.3</td>
<td>20.1</td>
<td>18.5</td>
<td>14.7</td>
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<tr>
<td><strong>WHITE</strong></td>
<td>16.0</td>
<td>16.3</td>
<td>13.0</td>
<td>9.4</td>
<td>18.4</td>
<td>13.7</td>
<td>12.7</td>
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<td><strong>BLACK</strong></td>
<td>27.8</td>
<td>42.1</td>
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<td>25.1</td>
<td>36.0</td>
<td>31.2</td>
<td>27.0</td>
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<tr>
<td><strong>HISPANIC</strong></td>
<td>36.9</td>
<td>52.2</td>
<td>40.8</td>
<td>29.5</td>
<td>47.3</td>
<td>33.6</td>
<td>24.3</td>
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<tr>
<td><strong>CHILDREN</strong></td>
<td>28.9</td>
<td>26.9</td>
<td>18.8</td>
<td>19.1</td>
<td>32.7</td>
<td>26.5</td>
<td>20.7</td>
</tr>
<tr>
<td><strong>AD. 65+</strong></td>
<td>13.1</td>
<td>12.5</td>
<td>10.1</td>
<td>7.8</td>
<td>9.5</td>
<td>10.7</td>
<td>9.4</td>
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<tr>
<td><strong>FEMALE HEADED HOUSEHOLDS</strong></td>
<td>50.6</td>
<td>52.6</td>
<td>39.3</td>
<td>39.0</td>
<td>54.5</td>
<td>49.2</td>
<td>40.5</td>
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## EDUCATION

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<tr>
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<th>DEKALB</th>
<th>JACKSON</th>
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<th>MADISON</th>
<th>MARSHALL</th>
<th>AL</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>POP. 25+ WITH HS DEGREE OR HIGHER</strong></td>
<td>72.4</td>
<td>76.9</td>
<td>83.1</td>
<td>90.7</td>
<td>77.5</td>
<td>84.3</td>
<td>86.7</td>
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<tr>
<td><strong>POP. 25+ WITH BA OR HIGHER</strong></td>
<td>11.2</td>
<td>12.4</td>
<td>23.2</td>
<td>39.4</td>
<td>16.6</td>
<td>23.5</td>
<td>29.8</td>
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<tr>
<td><strong>COLLEGE ENROLLMENT RATE</strong></td>
<td>61.9</td>
<td>61.6</td>
<td>63.6</td>
<td>71.3</td>
<td>67.0</td>
<td>64.4</td>
<td>65.5</td>
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</table>

## EMPLOYMENT

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<th>DEKALB</th>
<th>JACKSON</th>
<th>LIMESTONE</th>
<th>MADISON</th>
<th>MARSHALL</th>
<th>AL</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ANNUAL UNEMPLOYMENT RATE 2016</strong></td>
<td>6.2</td>
<td>6.4</td>
<td>5.3</td>
<td>5.2</td>
<td>5.5</td>
<td>6.0</td>
<td>4.9</td>
</tr>
<tr>
<td><strong>MEDIAN HOUSEHOLD INCOME</strong></td>
<td>$37,305</td>
<td>$40,201</td>
<td>$55,060</td>
<td>$59,117</td>
<td>$40,599</td>
<td>$44,833</td>
<td>$55,775</td>
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## FOOD SECURITY

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<th>MADISON</th>
<th>MARSHALL</th>
<th>AL</th>
<th>USA</th>
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</thead>
<tbody>
<tr>
<td><strong>SNAP RECPS.</strong></td>
<td>38.1</td>
<td>14.4</td>
<td>11.0</td>
<td>10.9</td>
<td>17.5</td>
<td>17.5</td>
<td>13.7</td>
</tr>
<tr>
<td><strong>FOOD INSECURITY</strong></td>
<td>11.7</td>
<td>14.3</td>
<td>12.9</td>
<td>15.1</td>
<td>12.4</td>
<td>17.7</td>
<td>13.4</td>
</tr>
<tr>
<td><strong>CHILDHOOD FOOD INSECURITY</strong></td>
<td>23.2</td>
<td>25.8</td>
<td>21.4</td>
<td>20.6</td>
<td>25.7</td>
<td>24.1</td>
<td>17.9</td>
</tr>
</tbody>
</table>


---

**Total Personal Income**

Total personal income is the measure of the total wealth available to purchase goods and services in a local economy. According to the Bureau of Economic Analysis (BEA), personal income is the total of all income that is received by all persons from all sources whether by wages and salaries, rental income, dividends and interest. The latest BEA data available is for 2015 and noted below:
Total personal income (in thousands of dollars) was measured within the TARCOG District for the individual counties in 2010 and 2015, and totaled to estimate the entire district. The greatest increase in total personal income again, as in the ten-year Census period of 2000-2010, was in Limestone County with a five-year change of 22.75%. Second was Madison County, with a 15.8% increase for the period. The reason for disaggregation of the region into counties for most statistical comparisons in this Strategy is demonstrated clearly here, where the TARCOG “regional” figure of a 15.7%, literally mirrors that of the dominant growth engine of Madison County. However, that “regional” figure masks the fact that total personal income in DeKalb County was barely over 10%, and that the three non-MSA Counties all experienced less than the state-wide average growth rate.
for the period; when compared with the national average, none of the District’s counties, including Limestone, matched the Nation-Wide growth rate figure of 24.1%.

Per Capita Personal Income

Per Capita Personal Income (PCI), the personal income of the residents of a given area divided by the resident population of the area is considered to be broadly representative of the amount of wealth within the local economy - standardized by the number of people in the study area. Per capita income has its weakness as a measure, particularly in that it does not account for income distribution; however, as a benchmarking tool for comparing study areas, it is a universally understood and easily-compared estimate of wealth that accounts for population. The PCI for Madison County in 2010 was $41,570. By 2015, it had increased 10.3% to $45,836, and while Madison County has continually had the highest Regional PCI, it ranked fourth in overall percentage growth/increase for the five-year period. Jackson County, based on out-migration and moderate mid-level jobs creation, had the region’s greatest relative PCI increase at 15.2%; Limestone and Marshall tied for second with 11.3% growth. DeKalb County, obviously with a 2015 PCI of $29,621, and only a 10.1% growth since 2010, ranked last in both absolute figures, and growth rate. In 2015, no TARCOG county had a PCI above the US figure of $49,435 and only Madison County topped the State’s $39,231 figure. In terms of PCI growth, no TARCOG county exceeded the US figure of 16.4%, and only Jackson County beat the State PCI growth rate of 13.0%.

<table>
<thead>
<tr>
<th>AREA</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>% CHANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>$42,467</td>
<td>$44,263</td>
<td>$44,457</td>
<td>$46,442</td>
<td>$48,131</td>
<td>$49,435</td>
<td>16.4</td>
</tr>
<tr>
<td>AL</td>
<td>$34,708</td>
<td>$35,482</td>
<td>$35,778</td>
<td>$36,954</td>
<td>$38,070</td>
<td>$39,231</td>
<td>13.0</td>
</tr>
<tr>
<td>DEKALB</td>
<td>$26,892</td>
<td>$25,650</td>
<td>$26,878</td>
<td>$27,818</td>
<td>$28,751</td>
<td>$29,621</td>
<td>10.1</td>
</tr>
<tr>
<td>JACKSON</td>
<td>$29,460</td>
<td>$30,269</td>
<td>$31,400</td>
<td>$32,119</td>
<td>$33,084</td>
<td>$33,930</td>
<td>15.2</td>
</tr>
<tr>
<td>LIMESTONE</td>
<td>$33,470</td>
<td>$34,854</td>
<td>$35,747</td>
<td>$35,802</td>
<td>$36,360</td>
<td>$37,260</td>
<td>11.3</td>
</tr>
<tr>
<td>MADISON</td>
<td>$41,570</td>
<td>$43,053</td>
<td>$43,636</td>
<td>$43,391</td>
<td>$44,642</td>
<td>$45,836</td>
<td>10.3</td>
</tr>
<tr>
<td>MARSHALL</td>
<td>$29,654</td>
<td>$29,480</td>
<td>$30,757</td>
<td>$31,049</td>
<td>$32,143</td>
<td>$32,996</td>
<td>11.3</td>
</tr>
</tbody>
</table>

Source: BEA / Federal Reserve Bank of St. Louis / https://fed.stlouisfed.org/series/PCP101071

Unemployment

Unemployment rates have been in a declining trend region-wide since 2012. The May 2017 figures are not seasonal averages and are inserted for a current reference. DeKalb County, had the 2012 region high rate of 8.5%, with Limestone Madison holding down the low rate of 6.2%. By 2016, Jackson County had the regional high rate of 6.4%, and, again, and Madison County had edged out limestone by a tenth of a point, with the regional low rate of 5.2%.

The charted unemployment rates are not seasonally adjusted. While the faster growing areas of Limestone and Madison Counties consistently have had the lowest unemployment rates.
Employment by Industry

Employment by industry is an indication of the type of industry sectors in which local economic activity is concentrated. This measure can be used to perform analyses of the concentration of the workforce in industries within the local economy and in comparison to other locations.

According to the Bureau of Economic Analysis (BEA), employment by industry from 2010-2015 exhibited both positive and negative changes throughout the District. As a whole, the District increased its total wage & salary (W&S) employment from 269,164 in 2010 to 281,297 in 2015, an increase of 4.5%. However, as would be expected, these employment numbers varied significantly from county to county. DeKalb County, with the regional low employment increase, only posted a 0.3% gain for the period; but, it did show growth, compared to previous periods of flat-to-negative growth.

In Jackson County, total wage and salary employment rose 3.7% from 15,704 in 2010, to 16,285 in 2015, which was an increase of 3.7%, which was not only the third highest percentage increase, but also represented a beginning turn-around trend in a county with a negative employment growth in the previous CEDS data profile.

Limestone County had the greatest rate of wage and salary employment increase at 13.0%, and also the greatest proportional rise in average annual wages, at 11.6%. This was the result of increasing local employment and rising job skills and associated pay levels brought with it; the trend is continuing through 2017, with a major shared industrial park complex and TVA Mega Site area being a Huntsville annexed area, locating in Limestone County, and offering high employment potential within less than 30 minutes’ drive of about 75% of the county’s residents. Over the period from 2012-16, the Alabama Department of Commerce has documented the creation of over 18,000 new jobs in the region through either the location of new industries, or the expansion of existing ones. This activity also represented the investment of $3.2 billion in buildings, machinery and other capital goods.
2015 was the record year in the period for investment, with 5,189 jobs and $1.3 billion in new investment stimulating the region. On the negative side, for the same period, the Alabama Department of Commerce’s “Warn List” of plant closings /layoffs documented 2,929 total jobs “lost “in the Region, with 1,989 listed as being from “closings”. 2013 was the high year for documented job loss, with 1,392. The loss of 1,154 jobs from the closing of Pilgrim’s Pride poultry processing operations in the City of Boaz, in Marshall County made up the bulk of this impact.

Job creation figures usually have a value of capital investment associated with them; the long term impact of job losses, however, is a different matter. Worker salaries and tax and community spending related to job losses cause effects ranging from the “simple” effect of workers leaving the area, or taking reduced salary reemployment, to far more complex interrelations on public services costs.

In Boaz the Pilgrim’s Pride closing removed a major customer, the City heavily invested in system expansions based on using profit revenue to offset costs. A similar dislocation occurred in Jackson County, where TVA’s closing of the Widow’s Creek Steam Plant and sale of the Bellefonte Nuclear Plant, while only creating a minor jobs loss ripple, removed significant In-Lieu-of-Taxes revenue from the county.

On a straight jobs count basis, from 2012 to 2016, based on these two state indexes, the region saw an increase of approximately 15,000 jobs, a significant portion of them being in high tech related manufacturing and goods and services, with firms like Polaris, Remington, and GE, and the steel and plastics industries in Limestone County being prime examples.

Education

Educational Attainment

Educational attainment is an indicator of the skill level of the workforce in the study area. It is also highly correlated with income and earnings. A highly skilled and educated workforce is essential to manufacturing productivity, efficiency, variety in goods and services, and scientific innovation. Educational attainment can be measured in the following classifications: elementary; secondary (middle school through high school); post-secondary (college); and post-graduate levels.
Overall the percentage of students seeking some form of higher education is increasing within the region and the overall workforce within the district is more educated than it was in each previous reporting period. According to the US Census, between 2000 and 2015, the proportion of individuals with a post-secondary degree increased in all counties except Madison, where there was a slight dip in the ratio due to changing employment patterns requiring a lower proportion of B.A. or greater educated workers in 2010; with the current technology industries employment rise in the region, this figure has once again grown in 2015.

Another trend in educational attainment is the decrease among those who have only acquired a high school diploma or who have less than a ninth grade education. This means that more students are aspiring toward, or obtaining, a higher education. As of 2015, only Madison County exceeded the State average for percentage of persons aged 25 and over that were high school graduates.

In DeKalb County, within the age group 25 and over, the 2015 rate of high school and “BA or more” graduates were the lowest. This is partially due to the demands of the county’s industrial mix, but it is also an indicator of a prime area for further attention both in industrial recruiting, and in education, as nearby job out-commuting counties Jackson and Marshall, both have higher levels of graduates in their workforce pools.

Higher Education

Higher educational institutions are vital resources for economic competitiveness. Innovation drives economic development and the pace of change in technology is increasing at a rapidly accelerating pace. Local economies are positioned to succeed in the global economy by possessing a highly trained, technically skilled workforce. Companies and research facilities look for leadership in education, research and development capacity, and technical training as prerequisites for investment in leading innovation sectors. In addition, the success the Alabama Community College System has had in workforce development and training in technical skills and trades has been a major force for economic development in the region.

The TARCOG region has several post-secondary educational institutions. These institutions fall under the categories of 4-year public institutions, community colleges, technical colleges, and non-profit independent institutions. As a whole, the region has a total of eight public post-secondary educational institutions. Three of these are 4-year public institutions, three are community colleges, one is a technical college, and one is a non-profit independent institution.
Transportation Infrastructure

Transportation Access and Available Land

The major Interstate highways in the District are: 1) Interstate 59 that runs northeast and southwest through the eastern portion of the District in DeKalb County and connects the area to Birmingham to the southwest and to Chattanooga to the northeast; 2) Interstate 65 that runs north and south through the western portion of the District in Limestone County and connects the area to Nashville to the north and to Decatur and Birmingham to the south; and 3) Interstate 565 that connects Interstate 65 to Huntsville.

Other major highways include: 1) US Highway 11 that parallels I-59; 2) US Highway 31 that parallels I-65; 3) US Highway 72 and Alt US Highway 72 that run east and west through the District and connect the area to Florence and Memphis to the west and to Chattanooga to the east; and 4) US Highway 231 and US Highway 431 that run north and south through the District connecting the area to Fayetteville and Nashville to the north and to Birmingham and Gadsden to the south. The following table summarizes the highway mileage within the District.

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>COUNTY</th>
<th>STATE</th>
<th>INTERSTATE</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEKALB COUNTY</td>
<td>1,598.0</td>
<td>212.6</td>
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<td>JACKSON COUNTY</td>
<td>1,063.0</td>
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<td>1,316.1</td>
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<td>LIMESTONE COUNTY</td>
<td>1,095.0</td>
<td>103.3</td>
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<tr>
<td>MADISON COUNTY</td>
<td>1,420.0</td>
<td>103.6</td>
<td>14.7</td>
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<tr>
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<td>1,218.0</td>
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<td>0.0</td>
<td>1,370.6</td>
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<tr>
<td>TOTAL</td>
<td>6,394.0</td>
<td>825.2</td>
<td>93.8</td>
<td>7,313.0</td>
</tr>
</tbody>
</table>
Railroads

The primary railroads in the District include 1.) the Norfolk Southern RR that runs through the Big Wills Valley area of DeKalb County, paralleling I-59, from Birmingham to Chattanooga; 2.) the Norfolk Southern RR that runs from Huntsville to Scottsboro and on up to Stevenson; 3.) the CSX Transportation RR that runs from Stevenson to Chattanooga; 4.) the CSX Transportation RR that runs north and south from Decatur through Athens to Ardmore; 5.) the Norfolk Southern RR that runs from Decatur to Huntsville; and 6) the CSX Transportation RR that runs from Guntersville to Attalla.

The District also has four short line railroads. These include, in Madison County, the Huntsville & Madison County Railroad Authority, the Huntsville – Madison County Airport Authority railroad, and the Mercury and Chase Railroad; and in Jackson County, the Sequatchie Valley Railroad.

Airports

There is one commercial airport in the District and several general aviation airports that are located throughout the District. The commercial airport is Huntsville International Airport. It is located in Madison County in the I-565 Corridor midway between the I-65 junction and downtown Huntsville. The facility covers 5,800 acres and has two parallel runways. The runways are 12,600 and 10,000 feet in length. The Airport offers commercial passenger service by major carriers. The Airport is part of the Port of Huntsville which consists of, in addition to the Airport, the International Intermodal Center and the Jet-Plex Industrial Park. The intermodal facility is an inland port that offers one central location for air, rail and highway transportation of domestic and international air cargo. The Port is home to Public Use Foreign Trade Zone 83, U.S. Customs, and the U.S. Department of Agriculture.

There is one airport in DeKalb County. Isbell Field Airport at Fort Payne is located about two miles north of Fort Payne in the central area of the county near Interstate 59. It is a general aviation airport used regularly for corporate and business use, recreational flying and as a gateway for resort tourists. It is also used occasionally for agricultural spraying, aerial photography and law enforcement, and has a 5,013 foot paved runway.

There are two airports in Jackson County. Scottsboro Municipal/Word Field is located about two miles from Scottsboro in the central area of the county near US 72. It is a general aviation airport used regularly for recreational flying and tourism and occasionally for aerial applications of agricultural chemicals, aerial inspections by utility companies and law enforcement. It has one 5,250 foot paved runway. The Stevenson Airport is located about two miles northeast of Stevenson, also near US 72. It is a general aviation airport used primarily for recreational flying and has one 4,106 foot paved runway.
There is one airport in Limestone County which is Pryor Field. Pryor Field is located three miles northeast of Decatur in the southeastern area of the county. It is a general aviation airport used for corporate use, flight instruction and recreational flying, and has a 6,001 foot paved runway.

Besides Huntsville International Airport, the other airport in Madison County is the Madison County Executive Airport. It is located one mile northeast of Huntsville in the northwest portion of the county. It is a general aviation airport used for corporate and business activity, emergency medical evacuation, and medical shipments as well as occasional use for recreational flying, aerial inspections, career training, search and rescue, aerial photography, and air shows. It has one 5,008 foot paved runway and a 5,600 square foot terminal building.

There are two airports in Marshall County at Guntersville and Albertville. Guntersville Municipal Airport is located just north of Guntersville along US Highway 431. It is a general aviation airport used regularly for recreational flying and career training and occasionally for corporate activity, receiving resort visitors, law enforcement, prisoner transport, emergency medical evacuation, medical shipments, real estate tours, and traffic and news reporting. It has one 3,360 foot paved runway. The Albertville Municipal Airport is located southwest of Albertville along Alabama Highway 75. It is a general aviation airport used primarily for flight instruction, corporate use and recreational flying. It is occasionally used for aerial inspections, search and rescue, and law enforcement, and has a 6,117 foot paved runway.

In addition to the airports that are available for public use, there is a runway at Redstone Arsenal exclusively for military use and a number of small landing strips for recreational flying and private use.

Waterways

According to the Army Corps of Engineers website, the US is linked by a network of inland waterways consisting of over 25,000 miles of navigable rivers and harbors. This network includes water passages along the Atlantic and Gulf Coast. It is utilized by both commercial and private vessels, linking ports in twenty states, extending from the Great Lakes to the Gulf of Mexico. The Tennessee-Cumberland Rivers system is a major part of our nationwide network of waterways. The Tennessee River is joined with the Cumberland by the Ohio River and the Barkley Canal. They are operated as a unit, linking communities and industry in the Tennessee River valley with our nationwide system of waterways and ports, providing a year-round water route of nearly 1200 miles. The Tennessee River is navigable from the Ohio River, near Paducah, Kentucky, to Celina, Tennessee, a distance of 381 miles. A series of fourteen locks and dams on the twin rivers system help move traffic up and down the rivers in stair steps. The Tennessee River falls 500 feet on its way to the Ohio
River. Over fifty million tons of commodities are shipped annually via the Tennessee River, and approximately 180 ports and terminals on the Tennessee support industries that provide thousands of beneficial jobs for valley residents.

Most of the goods shipped on the Tennessee River are giant bulk material, such as raw materials, fuels, and aerospace and defense production materials. Commodities such as coal make up 50% of all cargo shipped by barge on the Tennessee-Cumberland Rivers system. Crude materials, such as building products, iron and steel, are the next most frequently shipped items by barge. Petroleum, chemicals and farm products are also transported via the Tennessee River. Barge transportation requires less energy than any other type of transportation. According to the Army Corps of Engineers, one gallon of fuel will move one ton of freight fifty miles by barge, making it an ideal method of transportation and distribution of low cost shipping of raw materials, fuels, and other bulk items that support our Defense and Aerospace cluster.

Available Acreage

The District as a whole has approximately 11,380 acres available in the five counties. The sites are zoned as agricultural, business and commercial, heavy industrial, light industrial, and research and development. Some sites have no zoning. Agricultural zoning has 1,224 available acres, while Business and Commercial have 2,952 acres available. Heavy industrial has 563 acres available, and light industrial has 2,919 available acres. Sites zoned research and development have 525 acres available, and finally, sites that are not zoned have the highest available acreage with 3,196 acres ready for industry.

DeKalb County has 606 available acres of land, while Jackson County has 1,365 available acres. Madison County has 1,923.3 available acres and Marshall County has 1,343.6. Between the five counties, Limestone County has the most available land offering 6,141.5 acres.

Available Space

There are 5,804,956 square feet of available industrial space within the District on a total of 1,288 acres. These buildings are zoned as agricultural, business and commercial, heavy industrial, light industrial, office and institutional, retail, and warehouse. Some of the available space is in areas that have no zoning. Of the available space, 21,600 square feet are zoned as agricultural. Business and commercial zoning has a total of 69,250 square feet available. Buildings zoned heavy industrial have an available square footage of 937,745. Light industrial zoning has a total of 3,416,916 available square feet. Buildings zoned office and institutional have 177,368 square feet available. Retail-zoned buildings make up 7,000 square feet of the available space.
There is 101,000 square feet of warehouse zoning available. Finally, buildings that have no zoning have 1,074,077 square feet available.

In DeKalb County, there are 541,170 square feet available with 332 acres. Jackson County has 1,510,136 available square feet with 276 acres. Limestone County has 1,370,481 square feet available with 165 acres. In Madison County, there are 1,974,169 available square feet with 364 acres. Finally, Marshall County has a total of 409,000 available square feet with 151 acres.

The District has an abundance of available space for industry, most of it zoned for light industry, with Madison County having the most available space within the District.

Environment

Land Cover

The land within the five county District differs very much in type and use. The highest percentage of land in the District is forest. However, the land cover indicates the continued importance of agriculture to Limestone County and to a lesser extent to Madison County. The percentages of land cover for the District and for the counties within the District are as follows.

<table>
<thead>
<tr>
<th>Land Cover</th>
<th>TARCOG</th>
<th>DEKALB</th>
<th>JACKSON</th>
<th>LIMESTONE</th>
<th>MADISON</th>
<th>MARSHALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRINCIPLE CROPS</td>
<td>11.0%</td>
<td>4.2%</td>
<td>6.6%</td>
<td>30.4%</td>
<td>15.6%</td>
<td>2.4%</td>
</tr>
<tr>
<td>OTHER CROPS</td>
<td>1.3%</td>
<td>0.0%</td>
<td>1.3%</td>
<td>0.0%</td>
<td>2.1%</td>
<td>3.1%</td>
</tr>
<tr>
<td>PASTURE</td>
<td>10.0%</td>
<td>6.9%</td>
<td>11.2%</td>
<td>28.1%</td>
<td>3.1%</td>
<td>3.8%</td>
</tr>
<tr>
<td>HAY LAND</td>
<td>4.1%</td>
<td>0.8%</td>
<td>1.8%</td>
<td>10.7%</td>
<td>5.4%</td>
<td>4.0%</td>
</tr>
<tr>
<td>FOREST</td>
<td>44.8%</td>
<td>47.3%</td>
<td>64.2%</td>
<td>19.5%</td>
<td>34.6%</td>
<td>44.8%</td>
</tr>
<tr>
<td>URBAN</td>
<td>6.9%</td>
<td>3.0%</td>
<td>5.3%</td>
<td>7.5%</td>
<td>12.4%</td>
<td>6.7%</td>
</tr>
<tr>
<td>WATER</td>
<td>5.3%</td>
<td>0.5%</td>
<td>6.0%</td>
<td>3.9%</td>
<td>0.9%</td>
<td>16.8%</td>
</tr>
<tr>
<td>MINED LAND</td>
<td>0.3%</td>
<td>0.4%</td>
<td>0.8%</td>
<td>0.0%</td>
<td>0.1%</td>
<td>0.0%</td>
</tr>
<tr>
<td>OTHER</td>
<td>16.3%</td>
<td>37.0%</td>
<td>2.9%</td>
<td>0.0%</td>
<td>25.7%</td>
<td>18.5%</td>
</tr>
</tbody>
</table>

Water Quality

The Tennessee River, its watershed, tributaries, and abundant wetlands, is by far the most cherished resource in the District. It is the source of our region’s food supply, water supply, power supply, transportation routes, recreation, relaxation, history, culture and livelihood. In fact, recreational boating on the Tennessee River contributes over $25 million to the valley economy each year, and overall water-based recreation generates in excess of $2 Billion in annual revenues throughout the Tennessee Valley Region.

The importance of collaboration and planning to the overall quality of life within the Tennessee Valley watershed should never go understated. Watershed awareness is crucial to the planning process. Any development that happens within the Tennessee River watershed impacts every resident that lives within the basin who utilizes the river’s vast resources. Understanding watershed management and watershed integrity is
crucial to the planning and economic development process. Any activity that happens upstream will affect residents living downstream, and vice versa. The watershed does not respect geopolitical boundaries. It is important to involve, engage, and educate every interest living within the watershed the important role they share toward the integrity of their watershed and the quality of their drinking water and food supply. The Tennessee River also has traditionally provided jobs and supported the livelihoods of those living within its basin. It is a shared resource. It gives us a regional identity and a sense of place. According to a joint study by the U.S. Geological Survey and the Tennessee Valley Authority (TVA), the Tennessee River is the most intensively used river system in the country. Approximately 97 percent of the water currently withdrawn from the river is returned to the system for use downstream, making the region one of the lowest overall water consumers in the United States.

Economies throughout the Tennessee Valley Region depend on the river system for low-cost power generation, municipal & industrial water supply, efficient waterborne transportation, recreation, tourism, environmental preservation, and jobs. Approximately one hundred thirty-seven municipalities, fifty-eight industries, and seven mining companies in the Tennessee Valley rely on withdrawals of water from the Tennessee River System. Water is also withdrawn for TVA power-plant cooling and for irrigation purposes.

Clean drinking water and water quality is an essential quality of life issue for economic development now and in the future. In fact, it has been stated that it will not be the depletion of the oil supply we will be worrying about in the future, it will be clean water reserves. Water quality is also important to economic development, in that prospective businesses have already analyzed the study area and site selection process based on quality resources and strong natural infrastructure. The wetlands and migratory ecological corridors that span our vast region serve as natural water filtration and purification systems and should be protected and preserved as much as possible. If this vital natural infrastructure is sick, threatened or weakened, potential for economic growth and attraction may be lost.

Another serious environmental concern in recent years has been the drastic impact drought has had on the agricultural industry, especially affecting corn and grain crops throughout the region and the dropping water levels causing groundwater recharge rates to slow significantly. According to the University of Alabama, the underground aquifers in our region are not recharging at the rate they once were, affecting everything from our
drinking water, farming irrigation techniques, water recharge zones, ecosystem biodiversity, and many other things intrinsically dependent on this vital life source.

Over fifty million tons of commodities are shipped annually down the Tennessee River. Approximately one hundred-eighty ports and terminals on the Tennessee support industries that provide thousands of beneficial jobs for valley residents. Unfortunately, however, this robust economic and industrial activity from TVA power generation, the maintenance of the lock and dam system for hydroelectric power, and other riparian impacts, has adversely affected the water quality of the Tennessee, systematically transforming its ecosystem from a river environment to a lake environment and devastating our mollusk and mussel reserves, which was once one of the most biodiverse in the world. It is vital to the long-term sustainable economic development of the District that we work closely with environmental resource management experts to protect and maintain this valuable resource now and for future generations.

**Threatened and Endangered Species**

There are at least eighteen threatened or endangered species within the District. While the fact that these species are threatened or endangered is cause for concern, it also illustrates the biodiversity of the District which can be turned to opportunities for study and research. These species and their location within the five counties are shown in the following table.

<table>
<thead>
<tr>
<th>SPECIES</th>
<th>STATUS</th>
<th>DEKALB</th>
<th>JACKSON</th>
<th>LIMESTONE</th>
<th>MADISON</th>
<th>MARSHALL</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRAY BAT</td>
<td>Endangered</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>INDIANA BAT</td>
<td>Endangered</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BALD EAGLE</td>
<td>Threatened</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>WOOD STORK</td>
<td>Endangered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>RED COCKADED WOODPECKER</td>
<td>Endangered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>FLATTENED MUSK TURTLE</td>
<td>Threatened</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>SLACKWATER DARTER</td>
<td>Threatened</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BOULDER DARTER</td>
<td>Endangered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>PALEZONE SHINER</td>
<td>Endangered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SNAIL DARTER</td>
<td>Threatened</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>MUSSELS*</td>
<td>Varies</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>ANTHONY'S RIVERSNAIL</td>
<td>Endangered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>PRICE'S POTATO-BEAN</td>
<td>Threatened</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>MOREFIELD'S LEATHER FLOWER</td>
<td>Endangered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>AMERICAN HART'S TONGUE FERN</td>
<td>Threatened</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>HARPERELLA</td>
<td>Endangered</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KRAL'S WATER PLANTAIN</td>
<td>Threatened</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>GREEN PITCHER PLANT</td>
<td>Endangered</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Issues Covered

“State of the Regional Economy”

The TARCOG Regional Action Plan and Strategy for economic development has taken on new emphasis and direction in the past few years due to drastic change in local economic conditions.

The TARCOG region is part of a multi-level network of economic markets, ranging from small local markets, through regional markets to world export trade. Natural resources, geographic advantages, and location of port and intermodal facilities, banking and trade facilities have thus far provided necessary basis for economic growth and development.

The new and expanded industrial development provides new opportunities for employment, potential market development services, manufacturing and supply within the region. The TARGOC region is competing with other areas for a share of the growth and must take an aggressive position toward economic development, not only to attract additional growth, but to maintain its present market area. The TARCOG region enjoys a diverse economy due to no single industry dominating the job market.

TARCOG is approximately within 200 miles of nine important urban centers of the Southeastern U.S.: Chattanooga, Nashville and Memphis, Tennessee; Atlanta, Georgia; Columbus and Jackson Mississippi; Birmingham, Gadsden and Montgomery, Alabama.

Our region’s Department of Defense, hi-tech economy and research and development firms provides ample opportunities for further growth and economic development.

Redstone Arsenal, NASA Marshall Space Flight Center and Cummings Research Park (the 2nd largest technology park in the U.S.), puts TARCOG near the heart of aerospace and defense development. Aerospace industry sectors in our region include:

- Aircraft Maintenance, Repair & Overhaul (MRO)
- Aircraft Parts Manufacturing & MRO
- Guided Missile & Space Vehicle & Parts Manufacturing
- Information Technology Services
- General Manufacturing
- Engineering & R&D Services

The TARCOG region offers access to a thriving biotechnology community. Over 90 biotechnology-related companies are located in Alabama, including 12 in North Alabama, most of which are in Huntsville. The region boasts multiple associations, technology incubators and investment firms that are firmly committed to growing the biotechnology industry in North Alabama.

The Alabama Robotics Technology Park located within the TARCOG region is a $73 million collaboration between the state of Alabama, Calhoun Community College, AIDT and robotics industry leaders. The Park’s goals include training programs focused on company-specific needs, skill-specific training at all career levels and advanced systems integration opportunities.

The campus features three training facilities, each with a unique focus:
1) Robotic Maintenance Training Center: A 60,000 square foot facility providing no-cost training to Alabama industries and their affiliates.

2) Advanced Technology Research & Development Center: Four - 6,000 square foot client suites are available at no cost for research & development projects (the costs of utilities are billed on consumption basis).

3) Integration, Entrepreneurial & Paint/Dispense Training Center: This Center is in the pre-construction phase. Upon completion, it will allow companies to build and adapt automation for new and existing manufacturing processes.

The automotive and steel industries are also very much a part of TARCOG’s regional economy and are spreading into other parts of the State and into the State of Tennessee. As Alabama further emerges as a major player in the automotive in the automotive manufacturing arena, coupled with automotive plants distributed throughout the southeast, the automotive industry continues to have a tremendous impact in shaping the industrial base in local communities within the region. TARCOG’s proximity to local Toyota, Nissan, Mercedes, General Motors and Honda manufacturing sites has created a market for manufacturers and service and supply companies throughout the region.

<table>
<thead>
<tr>
<th>AUTOMOTIVE MANUFACTURERS</th>
<th>DISTANCE FROM TARCOC</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOYOTA MOTOR MANUFACTURING ALABAMA (HUNTSVILLE, AL)</td>
<td>Within TARCOC Region</td>
</tr>
<tr>
<td>NAVISTAR (HUNTSVILLE, AL)</td>
<td>Within TARCOC Region</td>
</tr>
<tr>
<td>GM / SATURN (SPRING HILL, TN)</td>
<td>75</td>
</tr>
<tr>
<td>NISSAN LOGISTICS CORPORATION (SMYRNA, TN)</td>
<td>105</td>
</tr>
<tr>
<td>NISSAN NORTH AMERICA (NASHVILLE, TN)</td>
<td>105</td>
</tr>
<tr>
<td>MERCEDES-BENZ (VANCE, AL)</td>
<td>128</td>
</tr>
<tr>
<td>HONDA (LINCOLN, AL)</td>
<td>134</td>
</tr>
<tr>
<td>TOYOTA MOTOR MANUFACTURING (BLUE SPRINGS, MS)</td>
<td>146</td>
</tr>
<tr>
<td>VOLKSWAGEN (CHATTANOOGA, TN)</td>
<td>148</td>
</tr>
<tr>
<td>HYUNDAI (MONTGOMERY, AL)</td>
<td>190</td>
</tr>
<tr>
<td>KIA (WEST POINT, GA)</td>
<td>265</td>
</tr>
<tr>
<td>NISSAN ASSEMBLY PLANT (CANTON, MS)</td>
<td>329</td>
</tr>
<tr>
<td>THYSSENKRUPP (MOBILE, AL)</td>
<td>348</td>
</tr>
</tbody>
</table>

Industry along the Interstate Highway System has grown exponentially in the last several years. A number of large manufacturers have come to the TARCOG region including Polaris, GE Aviation, and Remington just to name a few.

To continue to be successful, TARCOG must keep working with all economic development stakeholders to improve the region and its local communities. The world changes on a daily basis and we must be prepared to compete with other areas for all manner of developments. The TARCOG region must continue to be progressive and make a strong commitment to remain steadfast in our endeavors to provide the very best communities and quality of life for economic development possible.
Infrastructure of the Region

Infrastructure is considered to be the most important issue of concern facing the TARCOG region. Participants of the public meetings identified transportation including roads and bridges, drainage, water and sewer as their priority needs. According to comments received, safety hazards are faced by the residents of the region due to the poor condition of roads and bridges throughout the rural areas of the region, and the lack of municipal sewer systems in rural areas of the region where there are failing septic tanks and poor soil conditions. The upgrading of both water and sewer lines was identified as a dire need in several areas. This will provide for better waste disposal and fire protection in the rural areas of the region.

TRANSPORTATION ISSUES:

- I-565 Extension/Expansion
- Widening and reconstruction of County roads and bridges throughout the region
- Street and drainage improvements in small towns within TARCOG region
- Lack of public transportation in rural areas
- Lack of planning for new roads (land use / zoning)

The TARCOG region is within the Appalachian Regional Commission, which was established to provide transportation construction priorities and federal funding for those projects for local communities and jurisdictions within ARC.

WATER: Aging infrastructure and expanding infrastructure needs continue to challenge the water supply capacity throughout the region leading to rapidly increasing water rates.

SEWER: Aging infrastructure and expanding infrastructure needs continue to challenge the water supply capacity throughout the region leading to rapidly increasing sewer rates and a significant number of houses on septic tanks.
WORKFORCE: One of the issues raised consistently throughout the process was the workforce and the implications it holds for attracting and retaining industries. Companies across the country report experiencing a severe shortage of skilled employees as they adapt to today’s global economy. These shortages are exacerbated by changing demographics such as the retirement of baby boomers, technical advances demanding higher skills, and crushing global competition. At the same time, our education system is not producing students with the level of skills needed for today’s advanced manufacturing. The support of economic development initiatives that aim to foster growth, innovation and jobs by building entrepreneurial, regional alliances and providing youth-oriented awareness and education initiatives designed to captivate the next generation of American manufacturing talent is greatly needed.

TOURISM, CULTURE & ARTS: The TARCOG region has many assets that relate to tourism, recreation, culture and arts. These include the Tennessee River, Little River Canyon National Preserve, Desoto State Park, Guntersville State Park, Cathedral Caverns State Park, the U.S. Space and Rocket Center and many historical downtowns and neighborhoods throughout.

In terms of recreation and its associated tourism, the region has approximately 189,569 acres of park and recreational areas that provide a range of recreational opportunities for those living and visiting the TARCOG region. Additionally, approximately 1,254,587 acres of the region’s 3,433 square miles consists of forests, reservoirs, scenic areas and other areas classified as open space. The major holders of open space include:

- The National Park Service with 5,374 acres.
- The Department of Agriculture/other Federal Agencies with 74,307 acres.
- State of Alabama Department of Conservation and Natural Resources and Local Agencies with 93,626 acres.

Partners & Resources for Economic Development

There are a host of federal, state and regional and local government, nonprofit and private organizations that provide resources, support and partnerships for economic development within the TARCOG region. For potential funding information and funding availability, please contact the following economic development partners: TARCOG, NAIDA, and respective economic development organizations within each community and county. The following list provides examples of these invaluable resources.

- Arab Chamber of Commerce
- Boaz Area Chamber of Commerce
- Chamber of Commerce of Huntsville/Madison County
- Economic Development Association of Alabama
- Fort Payne Chamber of Commerce
- Grant Chamber of Commerce
- Greater Ardmore Chamber of Commerce
- Greater Jackson County Chamber of Commerce
- Greater Limestone County Chamber of Commerce
- Lake Guntersville Chamber of Commerce
- Madison Chamber of Commerce
- DeKalb County Economic Development Authority
- Jackson County Economic Development Authority
- Limestone County Industrial Development Board
- Marshall County Economic Development Authority
- North Alabama Industrial Development Association


Vision: Where Do We Want To Be?

Vision Statement

The TARCOG region envisions an inclusive community where every citizen enjoys an exceptional quality of life via the provision of a seamless education system, high quality employment availability, recreational and cultural activities and a myriad of housing choices. Our goal will be achieved by way of an innovative economy that creatively capitalizes on and develops available resources while fostering our natural environment. TARCOG will be an innovative regional partner with our member governments in an effort to develop and deliver services to improve the quality of life of the people and communities of Northeast Alabama.

This vision statement for the five-county TARCOG region is intended to answer the question, “Where do we want to be in the next five to ten years” and “What are our goals”. It is formulated on the region’s development potential and problems, and is intended to provide a framework for public and private decision making and serve as the basis for the formulation of the CEDS Action Plan.

The visioning process identified many “ideal” qualities and attributes of the region and its communities that all should work toward achieving and that are reflected in the vision statement. Ultimately, the description of our region and communities in ten years includes the following:

- The development of a highly skilled workforce and the ability to re-tool the existing regional workforce as necessary to address the ever-changing global economy.
- Stronger Regional Workforce and Economic Development agency collaboration and communication to meet goals.
- Development of a state of the art multi-modal transportation system (water/air/highway/rail).
- Quality essential infrastructure (water/sewer/roads/bridges/broadband).
- Comprehensive plans for all cities that can be rolled into a regional plan.

SWOT

The previous SWOT analysis for the region was reviewed and updated at the CEDS meetings held on June 14th 2017, June 15th, 2017, and June 28th, 2017. The SWOT method is defined below:

Strength – A factor that is favorable or conducive to realizing the economic development potential of the region.

Weakness – Anything that restricts or limits the economic development potential of the region.

Opportunity – A possibility due to a favorable combination of circumstances within the region.
Threat – Any circumstance or event with the potential to adversely impact the economic development potential of the region.

Eight major industry sectors comprise of the Economic Development puzzle in the region and therefore analyzed as part of this study. Following section identifies these sectors and lists Strengths, Weaknesses, Opportunities, and Threats for each sector.
Agricultural Economy:

**STRENGTHS:**
- Great Regional Market Access (Farm to Market Ease)
- Strong Regional Work Ethic
- Regional Agricultural Diversity (Crops/Livestock)
- Abundant Natural Resources (Water/Crop Land)
- Responsible Land Stewardship in TARCOG Area
- Wide Community Involvement
- Strong Income Generator in TARCOG Region
- Active Farming Support via Associations
- Full Service Poultry/Row Crop Industry
- Strong Forestry Products Producer
- Favorable Year Round Climate
- Rural TARCOG Area Top Poultry Producer in State

**WEAKNESSES:**
- Lack of Agricultural Education/ Bad Perception
- Lack of Agricultural Education for Youth/Adults
- Inadequate Workforce Availability
- Deteriorating Rural Road Systems
- Lack of Infrastructure (Natural Gas)
- Lack of Start-Up Investment & Revenue for New Ag. Based industries
- Urban Encroachment
- Aging Workforce (Farmers)

**OPPORTUNITIES:**
- Agriculture Related job Market Expansion is Available and Needed.
- Availability of Mentorship/Internship Programs via Local School Systems
- Further Promotion of Educational Opportunities about the Industry
- Improvement of infrastructure and Utilities Relevant to Agriculture.
- Promotion of Farm Tours & Agricultural Tourism Within Region
- Organic Food Production
- Farm to Table Market Shares
- Agri-tourism
- Promotion of USDA Programs to Involve New/Existing Farmers (Funding Sources)

**THREATS:**
- Over Reaching Federal/State Regulations
- Lack of Recognition of Farming Value to Region
- Rural/Urban Interface
- Shortage of Labor/Cost of Labor
- Property Classification/Taxation
• Population Growth/Higher Demands
• Product Related Diseases
• Inadequate Workforce
• Poor Public Infrastructure
• Forest Conservation Policies
• Weather Related Disasters

**Commercial Business Economy:**

**STRENGTHS:**
• Industrial Parks & Developable Land Available at Low Cost
• Utilities and Communications Corps. are Accommodating & Quick to Respond.
• Affordable Labor Force
• Strategic Location Between Major Metropolitan Areas
• Great Interstate Access
• Strong Technical School Training Programs within Region.
• Willing & Capable Legislative Delegation
• Great Climate
• Unique Retail Features
• Great Local Leadership
• Strong Quality of Life

**WEAKNESSES:**
• Differing Municipal Priorities/Lack of Regional Approach
• Insufficient Revenue for Retail/Commercial Recruitment
• Appropriate Workforce Training
• Ageing Public Infrastructure
• Lack of Retail Establishments in Rural Areas
• Lack of Promotion/Marketing
• Brain Drain
• Lack of Higher Wage Jobs in Rural Areas
• Vacant Buildings Inadequate for Use

**OPPORTUNITIES:**
• Marketing – Expos; Create Promotional Teams: (different people for different venues, expos, types of industries); Expand Economic Development Funding
• Growth of Regional Cities Could Provide Opportunities for 2nd Tier & Other Spin-Offs
• Refocus Workforce Development to Follow National Trends
• Underutilized Resources
• Regional Collaboration
• Promote Tourism/Cultural Heritage/Music
• Google Inc.
• Private/Public Partnerships & Branding the Region
• Further Develop Infrastructure’ Fiber-optics and Roadways
• Prioritize Downtown Revitalization Efforts

THREATS:
• Apathy/Non-support by Rural Residents
• Depleted Revenue Streams
• Strong Competition From Neighbors (GA/TN)
• Increase in Local Crime/Drug Use
• Increasing Healthcare Costs
• Illegal Immigration Associated Costs
• Government Overreach

Industrial Business Sector:

STRENGTHS:
• Alabama = “Right-to-Work“ State
• Readily Available Land
• Multiple Industrial Parks to Accommodate Need
• Strategic Location & Natural Resource Abundance
• Regional Port Authority
• Great Education Systems
• Low Utility Rates
• Good Workforce Training Facilities
• Available Railway
• Tennessee River Access
• International Airport in Region
• Extensive Utility Coverage
• Efficient Economic Development Teams

WEAKNESSES:
• Lack of Follow-Through/Vision for Future
• Rivalries Between Municipalities
• Poor marketing/Promotion
• Lack of Needed High Income Jobs in Rural Areas
• Brain Drain
• Lack of Funding for Econ. Dev. Recruitment
• Shortage of Trained Workforce
• Insufficient Investment in Funding Incentives
• Poor Roadways
• Poor Utilities

OPPORTUNITIES:
• Increase Workforce Development Efforts
• Promote Google Site in Jackson Co.
• Improve Communication Between Local Elected Officials, Civic Leaders
• Expand Utilities
• Further Enhance Promotional Activities
• Promote Career Exploration Programs in Local Schools
• “Gig City”
• Pursue Additional Tier Two Auto Suppliers for VW, Polaris, Ect.
• Expand and Promote Recreational Opportunities as a Quality of Life Enhancement for Region
• Invest in Broadband Expansion Throughout Region
• Promote Brownfield Redevelopments
• Expand/invest in public utilities upgrades and infrastructure

THREATS:
• Lack of Quality Regional Hospitals in Rural Areas
• Depleted Revenue Streams for Investment
• Strong Competition From Neighbors (GA/TN)
• Drug Abuse in Work Force
• Weak Leadership
• Increasing Utilities Rates
• Over Regulation by Federal Gov.
• Increasing Taxes
• Limited Entertainment for Families in Rural Areas (Quality of Life issue in Recruitment)
• Apathy/Low Expectations
• Brain Drain

Utilities & Infrastructure Sector:

STRENGTHS:
• Water Source Location – TN River
• Progressive Leadership
• Key Major Highways/Roads/
• Interstates
• Railroad Access (limited)
• High Speed Internet Accessibility
• Fiber Optic Capabilities
• Intermodal Facility in Huntsville
• Rail and River Transport Access
• Large Industrial Parks Located Close to Interstate
• Natural Gas Availability
• Lowest Cost Utilities
• Available Expansion Capacity for Utilities
• Utilities Capacity to Serve is there
WEAKNESSES:

- Inadequate funding for county roads & for transportation in general.
- Not enough interchanges along Interstate.
- County Secondary Bridges, & Farm-to-Market Roads in Poor Condition
- Only a few Access Points for Rail; Need Additional Intermodal Center
- Lack of revenue for Infrastructure Improvements
- Accessibility to Rural Areas Lacking
- Highway 431 Congestion Between Guntersville & Boaz
- I-565 Congestion
- Utilities Not Located in All Areas; Need for Expansion, but can be Installed (Especially for Large Industry; Lack of Sewer in Rural Areas, lack of High-Speed Internet in Rural Areas.

OPPORTUNITIES:

- Regional Airport Expansions
- Partnerships/Consolidation of Utilities
- Expand Service Areas for Utilities
- Identify New Revenue Sources
- Sale of Bellefonte Nuclear Plant
- Google
- Tennessee River Utilization
- Expanded Natural Gas & Fiber Optic Infrastructure
- Tele-Healthcare
- Communication Amongst Utility Providers
- A more tech-savvy population will drive more demand (Wi-Fi hotspots); Spin-offs of Google; Ancillary business. + Technology-Education programs

THREATS:

- Lack of funding for adequate infrastructure
- Always changing FCC rules
- Lagging access to broadband within rural areas
- Apathy
- Lack of strong localized leadership

Transportation

STRENGTHS:

- Presence of I-65 and I-565
- Access to the Tennessee River
- Location in relation to nine major metro areas within the southeast.
- Accessibility to two Class A railroads within the TARCOG region.
- Presence Huntsville International Airport and Intermodal Facility.
- Modest commute times in comparison to other nearby metros.
- Less densely populated than neighboring metropolitan areas.
WEAKNESSES:

- Most secondary roadways are in poor to moderate condition.
- I-565 and U.S. 72 are currently overcapacity in relation to traffic volume.
- Underutilized interstate exits on I-65 (Browns Ferry Road Exit).
- Lack of public transit in rural areas.
- High costs of airfares at Huntsville International.
- Lack of funding to adequately repair area roadways and bridges.
- Guntersville Dam in need of repair due to age.

OPPORTUNITIES:

- Growth opportunities at Huntsville international airport and regional airports within TARCOG region.
- Availability to further utilize Tennessee River as a logistics alternative for shipping.
- Growing regional population will require investment thus spurring additional infrastructure investments.
- Accessibility to developable land.
- Promotion of greenways to increase quality of life of citizens.

THREATS:

- Continued lack of funding to repair existing roadways and bridges.
- Potential growth will hamper air quality and traffic congestion.
- E-commerce negatively impacts tax base.
- Growing auto insurance costs.

Workforce Development Sector

STRENGTHS:

- Strong working relationships between among tech/community colleges and local business.
- Alabama Industrial Development Training program.
- Highly rated local technical schools and community colleges.
- Willing and able workforce available in TARCOG region.
- Education through industrial training programs in existence here.
- Alabama Ready to Work Program.

WEAKNESSES:

- Lack of soft-skills in available workforce.
- Rural school systems lack adequate funding to properly train/educate students.
- Drug abuse amongst work force available.
- Lack of public transit in rural areas.
- Lack of childcare resources in rural areas.
- Educational attainment levels of those in rural areas.
- Lack of community awareness/workforce development program promotion.
- Lack of adequate/diversified housing in rural areas.
OPPORTUNITIES:

- Further investment in technical school programs.
- Increased on the job training.
- Further bolster business and education collaboration to discuss needs.
- Expanded community college curriculum to meet business demands.
- Promotion of career technical careers and dual enrollment programs at local school systems.

THREATS:

- Growing drug abuse amongst working population.
- Negative perception of career technical careers.
- Underfunded workforce development programs.
- Low tax base for local school systems.
- Aging workforce in rural areas.
- Lack of concern by parents in student career training.
- Lack of communication between business and workforce development community.

Research and Development Sector

STRENGTHS:

- Presence of NASA/DOD/private space exploration firms in Cummings Research Park/Huntsville.
- High quality secondary educational institutions/colleges in region.
- Numerous established research and development firms in Huntsville metro area.
- Availability of land within Cummings Research Park.
- Lower tax rate than other R&D hubs with USA.
- Presence of HudsonAlpha Institute of Biotechnology.
- Quality K-12 educational institutions within metro area.
- High percentage of scientific consultant firms in northern Alabama.
- Presence of an existing highly educated workforce in place.

WEAKNESSES:

- Lack of trained workforce to carry out immediate/future R&D needs in region.
- Limited economic development recruitment budget.
- Perceived “conservative climate”.
- Lack of predatory work to compete in the global economy.
- Effectiveness of existing skilled labor training programs.
- Too narrowly focused on too few R&D fields within region. “Diversify” !!!
- Rural schools lag behind metro in educational quality via K-12.

OPPORTUNITIES:

- Further investment in advanced manufacturing training programs within Tennessee Valley region.
- Huntsville is forward thinking when it relates to public infrastructure needs.
- Future growth of DOD via base realignment coalition.
- Expanding biotechnical growth in Huntsville metro area.
• Growing aerospace and IT operations within TARCOG region.
• Investment in access to capital/network mentoring.
• Growing cyber/energy/geospatial fields in TARCOG region.

THREATS:
• Loss of students within region due to “brain drain”.
• Lack of adequate public infrastructure capacity, as Huntsville grows larger infrastructure limitations will grow more burdensome.
• Lack of recruitment funding.
• Political cycles/federal budget uncertainty.
• Ever changing cycle of the R&D economy and work needs.

Tourism

STRENGTHS:
• High availability for outdoor recreation sites with TARCOG region.
• Multiple State Parks within region.
• Established National Parks within region.
• Abundant festivals and events throughout the calendar year.
• Multiple scenic attractions and natural beauty.
• Tennessee River recreational opportunities.
• Rich history, culture and heritage within Tennessee Valley.
• Accessibility to trail systems, forests and rivers.
• Proximity to nine major metros.
• Low cost of visiting and living.

WEAKNESSES:
• Lack of promotion of tourist sites/events.
• Lack of adequate way-finding throughout region.
• Lack of revenue for marketing and tourism.
• Lack of awareness of local natural resources.
• Litter on roadways/lack of rural area pride.
• Nonexistent nightlife in rural areas close to tourist sites.
• Inadequate hotel space in rural areas.
• Current tourism is seasonably based. Diversify!

OPPORTUNITIES:
• Great opportunity to expand eco-tourism.
• Collaboration between municipalities/chambers of commerce within region for marketing events.
• Further investment in promotion of tourists sites within region.
• Develop way-finding throughout region.
• Promotion of hospitality training.
• Investment in rehabilitation of downtown buildings to promote revitalization efforts in municipal hubs.

THREATS:

• Further funding cuts to State/Federal parks.
• Competition from neighboring states.
• Property owners are resistant to change.
• TVA restrictions on Tennessee River waterfront.
• Regional competition in outdoor sports/tourism industry.
• Poor reporting of economic benefits in relation to tourism impact.
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Action Plan: How Do We Get There?

In furtherance of the foregoing mission statement, and for the accomplishment of the strategic projects, programs and activities contained in this Comprehensive Economic Development Strategy, the Top of Alabama Regional Council of Governments, operating as the Economic Development District for Sub-State District 12 of the State of Alabama, will undertake the following activities.

COORDINATE THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY:

Coordinate the preparation, updating, maintenance and implementation of the District’s Comprehensive Economic Development Strategy (CEDS).

- Comply with State and/or Economic Development Administration (EDA) reporting requirements on Comprehensive Economic Development Strategy (CEDS) structure, updates and revision mandates.
- Conduct an annual CEDS Goals, Objectives and Accomplishments review, apply requisite metrics, and make necessary revisions in scope and activities.
- Perform ongoing research to expand funding opportunities that match project needs outlined in the CEDS.

PROVIDE PROJECT INFORMATION:

Provide information to the State and EDA on the status of District programs, projects and activities as well as related needs that may qualify for EDA participation.

- Review potential projects for State and Federal program funding.
- Facilitate State or Federal pre-application and application activity, and as needed, perform any resulting project administration on a contract basis.

COORDINATE FUNDING:

Coordinate between Federal, State, regional and local agencies and communities to deliver funding for economic development and community development projects and programs.

- Continue to actively research public and private funding sources.
- Provide application assistance and project administration for the following agencies and programs.
  - Community Development Block Grant (CDBG)
  - Appalachian Regional Commission (ARC)
  - Rural Development Programs (USDA/RD)
  - Economic Development Administration (EDA)
  - Homeland Security/Federal Emergency Management Administration (FEMA)
  - U. S. Department of Transportation (DOT)
  - U. S. Environmental Protection Agency (EPA)
  - Alabama Department of Environmental Management (ADEM)
  - Other funding programs that may be identified
ASSIST LOCAL GOVERNMENTS:

Assist local governments in adapting their daily operations to modern planning methods and technologies that will increase their opportunities for growth.

- Assist local governments with community planning including the preparation of comprehensive plans, revitalization plans, and functional plans for recreation, transportation, etc.
- Assist local governments in the preparation of development regulations including zoning regulations, subdivision regulations, etc.
- Provide updates to member governments and economic development partners on development issues (i.e. funding opportunities, new legislation, best practices, etc.).

PROMOTE THE EXPANSION AND ATTRACTION OF BUSINESS AND INDUSTRY:

Promote the expansion of existing industry and the attraction of new industry that lead to the creation of quality jobs for the District.

- Update and maintain a District inventory of industrial sites/buildings and supporting infrastructure.
- Assist in securing financial aid to develop and expand local airport and water port facilities.
- Provide technical assistance to solicit needed equipment for the maintenance and improvement of the District’s highway, road and street systems.
- Work with federal, state and local commerce and trade organizations to support area industries impacted by foreign trade.
- Support the work of local organizations such as the North Alabama International Trade Association (NAITA).
- Assist local governments and stakeholders in developing plans for site improvements and expansions or the creation of new buildings and sites.
- Work with local economic development offices and chambers of commerce to solidify their economic base, establish a competitive position and target growth industries.

SUPPORT COMMERCIAL ENTREPRENEURSHIP:

Support local retail and service entrepreneurship to help foster downtown, commercial and tourism development.

- Provide statistical data to new and existing commercial establishments.
- Work with local chambers of commerce to provide retail trade analysis to help determine growth opportunities.
- Encourage the use of business incubators and support creation of new facilities.
- Assist the area recreation and tourism industry in determining target markets and developing strategies to reach them.
- Provide business financing assistance through revolving loan funds in coordination with USDA, Minority Business Enterprise Loan and Micro-Loan Programs, and State small business assistance programs.
- Provide Downtown Revitalization Planning.
SUPPORT COMMUNITY SERVICES INFRASTRUCTURE:
Facilitate growth and enhance public health, safety and welfare by providing support for community services infrastructure to improve the overall quality of life in the region.

- Serve as the Area Agency on Aging.
- Provide Community Planning for an aging populace.
- Work to provide cost effective healthcare facilities and services to meet the needs of the local citizenry.
- Assist communities in assessing recreational needs and research funding for new or upgraded facilities.
- Encourage land use development strategies that are consistent with floodplain management.
- Assist in research activities that determine the effects of economic and social impacts on waterways, aquifers, and wetlands: and work with local governments to define pollution problems and to outline corrective measures in areas of water quality, sewerage, solid waste and hazardous waste disposal.
- Develop planning and management programs for local governments that will help to achieve a rational balance between economic development and environment protection.
- Work with local governments to improve water and sewer systems that will meet the future demands of the service area.
- Assist local governments in securing funds for facilities, equipment and services that will provide adequate fire and police protection.
- Assist local governments in drafting homeland security plans and obtaining financial aid to implement services or acquire equipment to support emergency preparedness and ensure public safety.

PROVIDE TECHNICAL ASSISTANCE:
Provide technical assistance to the public and private sectors to help disseminate information relative to various local planning and management programs.

- Serve as repository for Census Data, Labor Market Data and other statistical information.
- Provide timely, accurate demographic information for each county on the Agency website.
- Assist in grant and loan writing, and provide mapping and graphics support as needed for grants, project proposals, etc., to eligible members.
- Conduct project-specific research and development studies (i.e., economic impact studies, annexation proposals, capital improvement plans).
- Support and encourage multi-county planning efforts and facilitate intergovernmental cooperation to address regional issues, e.g., the North Alabama Cooperative Purchasing Association (NACPA).
SERVE AS THE AREA-WIDE CLEARINGHOUSE:

Continue to serve as the Area-wide clearinghouse for information concerning Federal and State assistance programs.

Many of the ideals identified in the SWOT above are reflected in the recommended goals and strategies for economic development of the region and its communities. These goals and the strategies for achieving them are identified below.

Goals & Strategies

Goal: Advance Workforce Development in Region:

Regional Priority: The vitality of the TARCOG region is predicated upon the skills and productivity of its workforce. Therefore continued growth in the region requires an expansion of employment opportunities and the creation of more pathways for advancement for all TARCOG region residents. Efforts to develop a skilled workforce throughout the region and across the entire wage spectrum will be a core contribution to the region’s ongoing economic competitiveness. Workforce needs vary widely across the region, particularly along rural and urban lines, but key priorities for the entire region do exist. Specifically, important strategic directions in regional workforce development include:

- Identify and address gaps in educational support to match students to appropriate programs and improve educational attainment outcomes, with a particular focus on increasing attainment in fields aligned with employment needs throughout the region;
- Increase the capacity of programs that credential students for career skills at the secondary and post-secondary level, and support educational institutions in the implementation of curriculum driven in part by employment opportunities;
- Communicate to citizens, businesses and leaders that education and lifelong learning are important drivers of economic development and will be a fundamental requirement for the long-term success of the region, its citizens and its businesses;
- Coordinate between educational institutions and the private sector to align post-secondary program offerings and expand accessibility of programs oriented toward meeting labor needs at the local and regional level; and
- Support the sharing and distribution of labor market and career knowledge to inform TARCOG region residents as they make decisions related to their own skills development and workforce competitiveness.
- Develop partnerships or consortia among organizations that focus on training and development for business and industry.

Goal: Promote Entrepreneurship and Growth Acceleration:

Regional Priority: Support economic growth via biotech, research & development, manufacturing and other small businesses. With a strong entrepreneurial ecosystem and advanced R&D capabilities in the region’s businesses and universities, TARCOG is a well-positioned launch point for entrepreneurs looking to compete in the global innovation economy. Likewise, facilitating the growth of the region’s existing businesses is critical to
retaining the pillars of the local ecosystem. TARCOG must be a region where businesses are constantly being started and being re-invented to remain economically competitive.

The Huntsville area has a rich Science, Technology, and Defense heritage that is expected to grow stronger in the future. Among the emerging industries to advance in the District will be the biosciences and biotechnology. These existing and emerging sectors represent one of the major employment clusters in North Alabama and tend to generate high-paying jobs. Activities associated with science, technology, and defense often locate in office and technology parks near and within Redstone Arsenal.

Science, technology, and defense is included as a foundation sector because of its strong presence in the area, because of the opportunity for sector growth due to both the attraction of new employment and the creation of new employment through entrepreneurial activity. It is also included because it is primarily a traded cluster which is important because of the tendency of traded clusters to bring new wealth to a community.

Specific objectives for supporting entrepreneurship and accelerating growth among the region's existing firms include:

- Raising the reach, scale, and accessibility of programs in the region that support and encourage prospective entrepreneurs to start a business;
- Fostering collaborative working spaces where ideas can be commercialized and innovative businesses can grow;
- Supporting the development of place-specific and innovation-based industry clusters throughout the region that creates desirable jobs.
- Having dialogue with public and private stakeholders in order to identify and alleviate growth constraints for existing businesses.
- Supporting growth and development of the life science cluster, specifically the HudsonAlpha Institute of Biotechnology's efforts to support innovative research and development for the commercial and scientific arenas.
- Promote Industrial/Institutional Collaboration. Promote industrial and institutional collaboration to connect education and research activities to local industry and to explore strategies to further capitalize on the commercialization of technology and life science research.
Strengthen Education and Research. Support the continued development and strengthening of higher education and research activities among area colleges, universities, and not-for-profit research institutions.

Leverage Competitive Advantages. Facilitate organizational networks to foster a Regional.

Promote the local Innovation Cluster to leverage the District’s unique competitive advantages, i.e., its inherent social, environmental, economic and cultural assets.

Position for Base Realignment and Closure. Support continuous activity that strengthens the area’s position relating to Base Realignment and Closure and general military support.

Foster a Culture of Funding. Develop a “funding culture” for business and industry startups by fostering entrepreneurial connectivity and supporting business incubators.

Goal: Invest in Regional Economic Resilience

Regional Priority: Resilience encompasses the notion that the TARCOG region must be prepared to respond and recover from a disaster. TARCOG is focused on developing the region’s economic resilience, which includes working to reduce the region’s vulnerabilities to economic shocks, enhancing the regional economy's ability to recover from a shock, and supporting innovation in the region so that industry clusters in the TARCOG region remain competitive as industries evolve. The region’s economic resilience would be bolstered by:

- The formation and growth of businesses that export goods and services from the TARCOG region to broaden the potential customer base of industries in the region, thereby minimizing the impact of a shock affecting any one prominent trading partner;
- The continued development of new industry clusters in sectors adjacent to the region’s existing industrial base, thereby minimizing the region’s reliance on any one single industry;
- Employing a regional approach to resource development and management, namely coordination and collaboration for water planning and management, air quality emission reduction, accessibility of broadband, future power demands and transportation capacity; and
- Maintaining a database of establishments in the TARCOG that is searchable by sector, thereby strengthening the ability to respond to individual establishments affected by a disaster affecting any one sector.
- Involving Business in Hazard Mitigation. Involve the business community more fully in planning for hazard mitigation and disaster recovery in the interest of better preparedness both of the community and of the businesses themselves.
- Integrating Urban and Rural Economies. Use agriculture and forestry initiatives to better integrate urban and rural economies and to provide economic diversity, resiliency, and educational opportunities.
- Promoting Economic Diversification. Promote the diversification of local and regional economic clusters in order to create and retain jobs.

Goal: Promote Place Building:

The TARCOG region is growing rapidly, and it is incumbent on those shaping that development to guide it in a sustainable, efficient, and distinct direction. Place-building encompasses the notion that local businesses, residents, and developers can craft development scenarios that are both locally-driven and advantageous for future growth.
The desire of the District for its future is that its commercial places will be bustling centers of activity that are aesthetically pleasing and architecturally distinct. They are appropriately sized and conveniently located in accordance with their function and the community they serve, providing an extensive variety of local goods, services, and entertainment. They are attractive, comfortable and safe. They are walkable and have an appropriate human scale and dimension. People enjoy being there and using these gathering places to meet friends, attend events, and conduct business. TARCOG can advance this objective by:

- Acknowledge and preserve the distinct sense of place in local communities and incorporating that sense into future growth strategies;
- Cultivate new “places” by developing sustainable, fiscally efficient, and resilient communities and neighborhoods;
- Work to alleviate the region’s traffic issues by supporting the transformation of commuter communities into communities with a stronger base of local employment; and
- Explore the use of corridor-based alternatives analysis and traffic shed analysis that fully considers land use and commercial impacts in transportation planning.
- Leverage TARCOG’s regional perspective to provide information, data, and consultation to support the growth and diversification of industries in the region’s communities.
- Assist in the development of infrastructure and facilities throughout the region to provide capacity for desired economic growth.
- Improve TARCOG region infrastructure at current and future job creation sites; Industrial parks and potential sites in each county should have adequate utility service and capacity and transportation access.
- Assist local governments in industrial site planning and development.
- Support Complete Neighborhoods. Use the development and redevelopment of commercial centers and corridors as an integral, structural component of more complete and livable neighborhoods and communities. Locate and design community facilities to support livable, walkable places for every sector of the community, especially in regard to providing the elderly greater ease and access to perform daily activities.
- Protect Rural Character and the Urban/Rural Interface. Preserve the environmental integrity and rural character of communities developed on previous farmland. Use preservation strategies on the fringe of cities and towns to provide identity and quality of life to the entire region. Protect communities from natural disasters, and protect vital wetlands and migratory corridors to preserve the ecological integrity of the natural infrastructure.

Goal: Promote Further Economic & Community Development:

The District has long history of a broad base of manufacturing. In many cases, the manufacturing base has been undergoing a transition from the more traditional industries, such as textiles, to industries utilizing advanced manufacturing that involve higher technology and robotics. Activities associated with manufacturing, distribution and logistics share many of the same characteristics. Heavy manufacturing and distribution tend to locate in close proximity to major transportation facilities on the fringe of populated areas. Small manufacturing tends to be scattered among smaller cities and towns.
Manufacturing is a traded cluster economically that tends to add wealth to a community, particularly when headquarters are co-located with production facilities. Manufacturing, distribution and logistics is included as a foundation sector because manufacturing maintains its importance as the mainstay of the economy of smaller communities while advanced manufacturing associated with science and technology promises great potential for the area. It is also included because the location within the District of the navigable Tennessee River and the intermodal connections of rail and air give the District outstanding opportunities for effective and efficient transportation, distribution and logistics.

The desire of the District for its future is that it has not only maintained its position in manufacturing, but has significantly gained employment within the sector, successfully transitioning to those industries synergistically associated with the science and technology clusters. Not only can you find a well-trained workforce, but from this District you can easily ship your goods, economically, anywhere in the world. TARCOG will strive to support the raising of standards of living through the increase in employment opportunities by:

♦ Support of local economic development entities in their on-going job recruitment and retention efforts.
♦ Support of the expansion and development of industrial parks in each county and across the region.
♦ Entrepreneur Support - Assist business start-ups and existing businesses in finding the services and support they require to create and maintain jobs.
♦ Leverage resources to put in place the proper infrastructure throughout the District to facilitate the transportation of goods and services locally, regionally and globally, particularly intermodal transportation networks that support manufacturing and distribution. Also provide for expanded utility infrastructure and broadband communication capabilities.
♦ Support workforce development and education activities that facilitate the retraining of workers displaced by industries that are diminishing in importance, particularly retraining that prepares workers for employment in advanced manufacturing industries.
♦ Assist communities with economic development preparedness programs that involve community strategic planning, infrastructure development, site preparation, and general community livability.
♦ Promote the diversification of local and regional economic clusters in order to create and retain jobs.
Explore the creation and expansion of financial offerings available to new and expanding business and industry.

Promote the use of technology in economic development by assisting TARCOG member governments in providing the latest technology to citizens and job creators.

Coordinate and synchronize economic/community development activities with applicable workforce investment strategies.

Ensure that all regional development is in partnership with existing priorities.

Expand Financing Alternatives; Explore the creation and expansion of financial offerings available to new and expanding business and industry.

Goal: Encourage and support the development of cultural arts tourism centers and corridors throughout the region.

The desire of the District for its future is that the area has realized much of the economic potential of its tourism and recreational resources without degrading the characteristics that made them attractive in the first place. The watersheds, mountains, streams, lakes and wetlands are not only noted for their pristine and untouched beauty, but are home to one of the most unique and diverse ecosystems on the planet. The District’s towns, cities, countryside, and wilderness areas offer unmatched beauty and recreational opportunities. Specifically, important strategic directions in regional tourism development include:

- Encourage tourism development as a job creator for rural areas.
- Support rural tourism initiatives throughout the five-county region.
- Protect the natural infrastructure of the District, including the resources and natural beauty that serve as the infrastructure for many of the District’s tourism, travel, and recreational opportunities.
- Support efforts that educate the public and stakeholder communities about the economic value of natural infrastructure and environmental resources.
- Create and promote a cohesive, regional identity to be used for district-wide place marketing, promoting our unique Appalachian arts and cultural heritage.
- Foster a sense of connection and loyalty to the community and its places by protecting and preserving our natural resources as well as our towns, cities, neighborhoods and country-sides.
- Promote local arts and cultural activity that is unique only to the Tennessee Valley and the Southern Appalachian region. At the same time, utilize arts and cultural festivals to celebrate diversity and create a positive image for the State.
Evaluation: How Are We Doing?

ADOPTION

This CEDS is intended for adoption by the Board of Directors of the Top of Alabama Regional Council of Governments (TARCOG) and submission to the U. S. Economic Development Administration (EDA). Adoption is by a resolution contained in the Appendices to this document. Adoption serves as authorization for implementing agencies to take action in furtherance of the objectives contained herein.

OVERSIGHT AND THE ANNUAL WORK PROGRAM

Oversight of this CEDS is vested in the Department of Planning and Economic Development of TARCOG. The Department, with the advice of the Executive Director and Board of Directors of TARCOG, will prepare an Annual Work Program consisting of activities and measures considered to be reasonably attainable within the scope of each year with the intent of addressing the highest priorities and eventually accomplishing the objectives of the entire CEDS. In the course of preparing the Annual Work Program, the Department and the Board will maintain communication with those agencies and entities that may be designated as stakeholders and may be involved with implementation of specific actions.

CEDS ANNUAL PERFORMANCE REPORT

This CEDS is to be monitored by a process of annual review. Following adoption of this CEDS, a CEDS Annual Performance Report will be prepared and submitted to the Board and to EDA. The Report will indicate progress made toward implementing the activities and measures contained in the CEDS and in the Annual Work Program as well as changes in the economic environment of the District that may affect adjustments to the CEDS or to the Annual Work Program. For each item, a statement will be made regarding whether it has been accomplished and, if not, why it has not and what can be done to accomplish it in the future. If it is determined that an activity cannot or should not be accomplished, that also will be stated. The CEDS Annual Performance Report and the Annual Work Program may be consolidated into a single report.

The evaluation and update will entail continuing public participation and will result in the publication of a new Comprehensive Economic Development Strategy.

The following is a list of the performance measures that will used to evaluate successful development and implementation of the CEDS. Other measures may be added from time to time in order to obtain a better picture of the economic situation of the District.

1) Number is of jobs created after implementation of the CEDS;
2) Number and types of investments undertaken in the District;
3) Number of jobs retained in the District;
4) Amount of private sector investment in the District after implementation of the CEDS; and
5) Changes in the economic environment of the District.

CONTINUING PUBLIC INVOLVEMENT

Public involvement is important to the development of any plan. But, it is just as important to the implementation efforts that follow. Continuing public involvement in the development and implementation of a CEDS helps to assure the reasonableness and public acceptance of a community’s efforts.
Copies of this CEDS will be maintained and available at the offices of TARCOG. In addition, it will be placed on TARCOG’s web site. Between five-year updates, a file will be maintained by the Department containing public comments regarding the contents of the CEDS. These comments will be periodically reviewed by the Department during annual monitoring of the progress of implementation and during evaluation and update.

**FIVE-YEAR UPDATE**

An evaluation and update of this CEDS will be performed no later than five years following its initial adoption. Upon initial adoption, it will be distributed to the Board of Directors, to the member governments, and to other participating organizations. The Department should begin the process of updating the CEDS in year four of the five year planning period. Within that year, an evaluation report will be prepared that will involve a thorough review of this CEDS including:

1) An update of the research and methodologies contained herein;
2) A review of the relationship of this CEDS with any plans or programs of a participating organization that have been prepared since the initial publication of this CEDS;
3) A review of the goals and objectives and actions for implementation to ascertain those new activities that need to be included and those activities that are no longer relevant for inclusion; and
4) A review of the administrative provisions of this CEDS in order to determine their effectiveness, and whether administrative changes are in order.
Appendices
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The TARCOG Board of Directors and the CEDS Committee are one in the same. Participants in the original CEDS (and its current CEDS Committee) still include representatives of local governments, academic professionals, as well as representatives of minority populations, the elderly, and concerned citizens groups. The mix has been modified to meet current EDA requirements for an increased representation of the private sector and its business leaders. The TARCOG Board of Directors (listing Attached) serves as the Agency’s CEDS/Strategy Committee.

During TARCOG’s FY 2017, some membership adjustments were made to the Board, primarily due to elections, and a few other actions. These changes were made in response to both local conditions and needs, and to insure the continued incorporation of public and private sector representation in proportions that meet EDA’s CEDS participation guidelines/requirements..

Board composition changes/actions during FY 2017 included the following:

**BOARD UPDATE PER ACTIONS**

- Jennie Robinson, Council President for Huntsville City Council, replaced Councilmen Richard Showers.
- Madison County Commissioner Steve Haraway took the seat of outgoing Commissioner Eddie Sisk.
- Mayor Robin Shelton of Scottsboro took the seat of outgoing Mayor Melton Potter.
- Councilman Mark Russell replaced Councilman Bill Kling of Huntsville.
- Councilman John Seifert of Madison replaced Mayor Troy Trulock.
- Councilman Craig Hill transitioned from City Council to County Commission
CEDS/Strategy Committee & Board Structure Certification

The Top of Alabama Regional Council of Governments (TARCOG) Economic Development District was formally established May 1, 1973. The TARCOG Board of Directors has been actively involved in setting the Comprehensive Economic Development Strategy for the five county service area including DeKalb, Jackson, Limestone, Madison and Marshall Counties. The TARCOG Board is the Economic Development District Board that represents the counties, municipalities and citizens therein. This Board which represents a 2014 estimated 650,000 citizens is composed of a maximum of 30 individuals. This body also serves as the TARCOG CEDS Committee.

Between 2001/02 and 2007, TARCOG provided annual updates to the CEDS as a part of its annual report. In September 2007, we submitted our fully revised 2008-2012 CEDS designed to meet the 005-06 §303-7 CEDS Requirements. This CEDS replaced the original 2001/02 document. The Revised CEDS overview section was updated to reflect 2002-2007 indicator changes, and Economic Census information; and, a full set of revised Strategies and performance and evaluation criteria was included. Additionally, each year from 2008, an Annual CEDS update report/evaluation has been made.

To ensure that the CEDS continues as an accurate measure of the effectiveness of the District in meeting the goals of the strategy, the District was a prime player in the state’s AARC developed multi-regional Strategic Plan and the resultant State CEDS, issued June 2011. This EDA supported Plan developed uniform data measures, updated public participation/stakeholder input, and generated an initial state project inventory, prioritized by Districts and categorical needs.

Participants in the original CEDS (and the current CEDS Committee) include representatives of local governments, academic professionals, as well as representatives of minority populations, the elderly, and concerned citizens groups. The mix is structured to meet EDA requirements for an increased representation of the private sector and its business leaders. The TARCOG Board of Directors (listing Attached) serves as the Agency’s CEDS/Strategy Committee.

During FY/CY 2017, some membership adjustments were made to the Board due to elected officials’ changes, and to insure that it continued to meet EDA CEDS requirements, and incorporate a wide spectrum of participation in the CEDS process. TARCOG certifies that the EDD’s current, FY2017 board is in compliance with current EDA Regulations.

James O’Neal
James O’Neal, President

Nancy Robertson
Nancy Robertson, Executive Director
By-Law Requirements
2016-2017

18 Elected Officials

1. Mary Caudle (Mayor, City of Triana)
2. Jerry Jennings (City of Madison)
3. Mark Yarbrough (Chairman, Limestone County Commission)
4. Jennie Robinson (Council President, City of Huntsville)
5. Phillip Kelley (Councilman, City of Guntersville)
6. Steve Turner (Commissioner, Limestone County Commission)
7. Matthew Hodges (Chairman, Jackson County Commission)
8. Ricky Harcrow (President, DeKalb County Commission) represented by Matt Martin (DeKalb County Emergency Management Agency)
9. Tracy Honea (Mayor, City of Albertville) represented by Dale Carroll (Albertville Senior Center)
10. Pam Simpson (DeKalb County Circuit Clerk)
11. Steve Haraway (Commissioner, Madison County Commission)
12. Robin Shelton (Mayor, City of Scottsboro)
13. Tommy Battle (Mayor, City of Huntsville)
14. Mark Russell (Councilman, City of Huntsville)
15. Frank Travis (Councilman, City of Athens)
16. James Lucas (Athens Board of Education)
17. Bob Joslin (Mayor, City of Arab)
18. David Kelley (Commissioner, Marshall County Commission)
19. John Seifert (Councilman, City of Madison)
20. Chuck Ables (Mayor, Town of Geraldine)
21. Craig Hill (Commissioner, Madison County)

12 Non-elected Officials

1. Philip Anderson (First National Bank of Scottsboro)
2. James O'Neal (O'Neals Manufacturing)
3. Helen Carter (Full Scope, Inc.)
4. Thornton Stanley, Jr. (Stanley Construction Company)
5. Paula Phillips (Peoples Independent Bank)
6. Nancy Griggs (Northeast Alabama Community College-Workforce Development)
8. Mike Kirkland (Vulcan Materials)
9. Carol Beddingfield (Fort Payne Chamber of Commerce)
By-Law Requirements
By County
2016-2017

DeKalb County: (4)

Ms. Carol Beddingfield – Fort Payne Chamber of Commerce
Mr. Chuck Ables – Mayor, Town of Geraldine
Ms. Nancy Griggs – private enterprise
Mr. Ricky Harcrow – President, DeKalb County Commission
Ms. Pam Simpson – County Clerk

Jackson County: (4)

Mr. Philip Anderson – Board Member, Jackson County Chamber of Commerce
(First National Bank of Scottsboro)
Mr. Robin Shelton – Mayor, City of Scottsboro
Mr. Mike Kirkland – private enterprise
Mr. James O’Neal – private enterprise
Mr. Matthew Hodges – Chairman, County Commission

Limestone County: (4)

Ms. Helen Carter – private enterprise
Mr. Frank Travis – Councilman, City of Athens
Mr. Steve Turner – County Commission
Mr. Mark Yarbrough – Chairman, Limestone County Commission
Mr. James Lucas – Athens Board of Education

Marshall County: (4)

Ms. Paula Phillips – private enterprise
Mr. Phillip Kelley – Councilman, City of Guntersville
Mr. Tracy Honea – Mayor, City of Albertville
Mr. Bob Joslin – Mayor, City of Arab
Mr. David Kelley – County Commission

Madison County: (8, City of Hsv-4 & City of Madison-2)

Mr. Kenneth Baldwin – private enterprise
Mr. Steve Haraway – County Commission
Ms. Mary Caudle – Mayor, Town of Triana
Mr. Jerry Jennings – City of Madison
Ms. Jennie Robinson – Council President, City of Huntsville
Mr. Mark Russell – Councilman, City of Huntsville
Mr. Tommy Battle – Mayor, City of Huntsville
Mr. Thornton Stanley – private enterprise
Mr. John Seifert – Councilman, City of Madison
TARCOG 2016/17 BOARD OF DIRECTORS
(9/30/17 Listing by Association/Sector Representation)

Officers

President          James O’Neal, O’Neal’s Manufacturing, Inc.
Vice-President     Helen Carter, Full Scope, Inc.
Secretary          Mary Caudle* Mayor, City of Triana
Treasurer          Thornton Stanley, Jr.* Stanley Construction Company
Ex-officio         Jerry Jennings, City of Madison

Members

Paula Phillips     Peoples Independent Bank
Mark Yarbrough     Chairman, Limestone County Commission
Jennie Robinson    City Council President, City of Huntsville
Phillip Kelley     Commissioner, City of Guntersville
Phillip Anderson   Greater Jackson County Chamber of Commerce
                    (First National Bank of Scottsboro)
Steve Turner       Commissioner, Limestone County Commission
Matthew Hodges     Chairman, Jackson County Commission
Ricky Harcrow      President, DeKalb County Commission
Tracy Honea        Mayor, City of Albertville
Pam Simpson        Circuit Clerk, DeKalb County
Steve Haraway      Commissioner, Madison County Commission
Robin Shelton      Mayor, City of Scottsboro
Tommy Battle       Mayor, City of Huntsville
Mark Russell       Councilman, City of Huntsville
Frank Travis*      Councilman, City of Athens
Nancy Griggs       Northeast Alabama Community College (Workforce Development)
James Lucas*       Athens Board of Education
Bob Joslin         Mayor, City of Arab
Kenneth Baldwin*   Volunteer for North Alabama Veterans Mental Health Council
David Kelley       Commissioner, Marshall County Commission
John Seifert       Councilman, City of Madison
Chuck Ables        Mayor, Town of Geraldine
Mike Kirkland      Vulcan Materials Construction Materials/Greater Jackson County Chamber of Commerce
Carol Beddingfield Fort Payne Chamber of Commerce
Craig Hill         Commissioner, Madison County Commission

* Denotes Minority Members

Total Members
30
5 Minority Members = 16%
7 Female Members = 23%
22 Elected Officials = 73%
8 Private Sector = 26%
Top of Alabama Regional Council of Governments
2016/2017 Board of Directors by County

**DeKalb County:**
Ms. Carol Beddingfield – Fort Payne Chamber of Commerce
Mr. Chuck Ables – Mayor, Town of Geraldine
Mr. Ricky Harcrow – President, DeKalb County Commission
Ms. Pam Simpson – County Clerk

**Jackson County:**
Mr. Philip Anderson – Board Member, Jackson County Chamber of Commerce
(First National Bank of Scottsboro)
Mr. Robin Shelton – Mayor, City of Scottsboro
Mr. Mike Kirkland – private enterprise
Mr. James O'Neal – private enterprise
Mr. Matthew Hodges – Chairman, County Commission

**Limestone County:**
Ms. Helen Carter – private enterprise
Mr. Frank Travis – Councilman, City of Athens
Mr. Steve Turner – County Commission
Mr. Mark Yarbrough – Chairman, Limestone County Commission
Mr. James Lucas – Athens Board of Education

**Madison County:**
Mr. Kenneth Baldwin – private enterprise
Mr. Steve Haraway – County Commission
Ms. Mary Caudle – Mayor, Town of Triana
Mr. Jerry Jennings – Councilman, City of Madison
Ms. Jennie Robinson – Council President, City of Huntsville
Mr. Mark Russell – Councilman, City of Huntsville
Mr. Tommy Battle – Mayor, City of Huntsville
Mr. Thornton Stanley – private enterprise
Ms. Nancy Griggs – private enterprise
Mr. John Seifert – Councilman, City of Madison
Mr. Craig Hill – County Commission

**Marshall County:**
Ms. Paula Phillips – private enterprise
Ms. Leigh Dollar – Mayor, City of Guntersville
Mr. Tracy Honea – Mayor, City of Albertville
Mr. Bob Joslin – Mayor, City of Arab
Mr. David Kelley – County Commission

Female = 8