



Prepared for: U. S. Economic Development Administration

Living
+
Innovating
+
Thriving

Middle Georgia

Comprehensive
Economic
Development
Strategy

2022—2027

Table of Contents

Executive Summary.....	3
2022-2027 CEDS Plan Overview.....	4
CEDS Strategy Committee.....	4
Public and Stakeholder Involvement.....	5
Background Information.....	6
Geographical and Historical Context.....	6
Statistical Overview.....	8
SWOT Analysis.....	14
Strengths.....	14
Weaknesses.....	15
Opportunities.....	16
Threats.....	17
Strategic Direction for 2022-2027.....	19
Regional Vision Statement.....	19
Goals and Objectives.....	19
Regional and Local Action Plans.....	22
Regional Activities.....	22
Baldwin County Activities.....	32
Crawford County Activities.....	32
Houston County Activities.....	33
Jones County Activities.....	34
Macon-Bibb County Activities.....	34
Monroe County Activities.....	35
Peach County Activities.....	35
Pulaski County Activities.....	36
Putnam County Activities.....	37
Twiggs County Activities.....	37
Wilkinson County Activities.....	38
Work on EDA Investment Priorities in Middle Georgia.....	39
Equity.....	39
Recovery and Resilience.....	43
Workforce Development.....	44
Manufacturing.....	44
Technology-Based Economic Development.....	44
Environmentally Sustainable Development.....	45
Exports and Foreign Direct Investment (FDI).....	45
Evaluation Framework.....	46
Quantitative Measures of Outcomes.....	46
Qualitative Measures of Capacity.....	46
A Final Word on Evaluation.....	47
Appendix A: Plan Adoption Resolution.....	48
Appendix B: Data Tables.....	49

Executive Summary

The world was rocked in unexpected ways over the last five years since the Middle Georgia Economic Development District prepared its last Comprehensive Economic Development Strategy (CEDS). The COVID-19 pandemic and associated strains on global supply chains and inflation have led to notable challenges for businesses, industries, and communities across the globe. Amid it all, Middle Georgia has remained focused on continuing to grow its economy and capture a more prominent role in shaping the new types of technology, entrepreneurship, and development that will be present over the following years. For the next five years, Middle Georgia will focus on: **Living + Innovating + Thriving**.

Living in Middle Georgia ++++++

Middle Georgia will focus on being an outstanding community in which to live as communities of the region focus on attracting people to Middle Georgia. As the world becomes more virtually connected, the importance of place will only grow as young couples start families, professionals look to advance their careers, or retirees search for the best quality of life. Leaders of Middle Georgia will **Connect a Skilled Workforce with Quality Jobs** so that businesses find a happy home and workers find fulfillment in their lives. Communities will **Invest in Infrastructure** so that every Middle Georgian has the quality of service they deserve to stay connected to the world. Leaders will **Advance Our Communities** so that our neighborhoods are safe and vibrant and so everyone who wants to live here will find a place to call home.

Innovating in Middle Georgia ++++++

In a changing world, Middle Georgia will be a leader by deciding its own future and making the technology of tomorrow work for the people of the region. The 11 counties of Middle Georgia have made tremendous strides in fostering entrepreneurship and innovation in recent years, and this commitment will continue. To build out from the core, Middle Georgia will first **Sustain Robins Air Force Base** as the region’s largest employer and hub of innovation. Entrepreneurs and economic developers will collaborate to **Implement the Middle Georgia Innovation Project** and will train a future workforce to take the lead in adopting Industry 4.0 technologies for a variety of uses. All the while, stewards of the region will **Attract Green Jobs and Investment** to leverage economic growth in a sustainable way that preserves the planet while also strengthening local businesses and industries.

Thriving in Middle Georgia ++++++

As the economy of Middle Georgia continues to grow and develop, the region will focus on thriving in the sectors of the economy we are most suited to support. By building on the strengths of the local workforce and industrial base, Middle Georgia will become known for great things and will gain a reputation as a place where businesses and people can thrive. Building upon the strengths of the workforce, partnerships, and investments will **Enhance the Regional Aerospace Industry**, placing economic resilience in step with the defense industry and building greater connections to other communities across the nation. The transportation network of the region can also be utilized to **Support the Freight and Logistics Industry**, which has rapidly grown to be a cornerstone of the region’s economy. Finally, as local communities work to improve quality of life, the region will **Capitalize on our Natural and Cultural Resources** by attracting tourists and working to develop Georgia’s first National Park and Preserve.

Through this work, Middle Georgia will be **Living + Innovating + Thriving**.

2022-2027 CEDS Plan Overview

The Comprehensive Economic Development Strategy (CEDS) for the Middle Georgia Economic Development District is updated every five years as required under regulations from the U.S. Economic Development Administration (EDA). This plan, which is built upon numerous local plans and economic development initiatives, provides a broad regional framework to shape public sector support for growing economic prosperity at a regional level. This CEDS is prepared to meet the requirements of EDA for funding through the Public Works and Economic Adjustment Assistance programs. It is also a requirement for the continued designation of the Middle Georgia Economic Development District, which consists of 11 counties and 20 cities in the central part of Georgia. The boundaries of the Economic Development District are coterminous with the boundaries of the Middle Georgia Regional Commission, which provides economic and community development staff for the region, while also serving as the Area Agency on Aging and state Service Delivery Region for the same 11 counties.

CEDS Strategy Committee

The governing Council of the Middle Georgia Regional Commission was designated as the Strategy Committee for updates to the CEDS. This body includes both local elected officials and private sector representatives from each county, as well as several statewide appointees. The members of the Regional Commission Council, as of the adoption of this plan, are listed below:

Baldwin County	Crawford County	Houston County	Jones County	Macon-Bibb County	Monroe County
Johnny Westmoreland	Jackie McCowen	Tommy Stalnaker	Chris Weidner	Lester Miller	Greg Tapley
Mary Parham-Copelan	Jay Andrews	John Harley*	Ed Barbee	Seth Clark	Eric Wilson
Lee Slade	Jake Watson	George Slaphey	William Lee Brown	Dominique Johnson	Richard Bazemore
Denese Shinholster	Hill Bentley	Randall Walker	Francis Adams	Juawn Jackson	Melvin Lawrence
		Clifford Holmes	Joy Carr		Lynn Miller
Peach County	Pulaski County	Putnam County	Twiggs County	Wilkinson County	Statewide Appointees
Martin Moseley	Jenna Mashburn	Billy Webster	Ken Fowler	Michael Gotell	James Vaughn
Michael Chidester	Shelly Berryhill	John Reid	Charles Williams	Charles Brack	Nancy Nash
James Khoury	Sara Myers	Paul Van Haute	Shannon Hart	Marty Dominy	Charles Sims
James Richardson	Staci Vickers	Lynn Butterworth	Kathryn Epps	Daniel Starley	Bubber Epps
Alonzo Allen		Gary Sanders	Judy Sherling	Travis Miller	

* Current Council Chair

Public and Stakeholder Involvement

The Middle Georgia Regional Commission actively sought input from economic development practitioners throughout the planning process. Several regional stakeholder meetings were held which were open to representatives of the CEDS Strategy Committee, as well as staff-level experts from the various local governments of the region. Through stakeholder meetings and direct interviews, the following agencies also participated in the planning process:

City of Byron Economic Development	Development Authority of Jones County
City of Centerville Economic Development	Development Authority of the City of Milledgeville and Baldwin County
City of Forsyth Economic Development	Development Authority of Peach County
City of Fort Valley Economic Development	Development Authority of Wilkinson County
City of Hawkinsville Economic Development	Georgia Department of Community Affairs
City of Milledgeville Main Street/DDA	Houston County Development Authority
City of Perry Economic Development and City of Perry Main Street/DDA	Macon-Bibb County Industrial Authority
City of Warner Robins Economic and Community Development	Macon-Bibb County Urban Development Authority
Crawford County Development Authority	Macon Chamber of Commerce
Crawford County Chamber of Commerce	Middle Georgia Regional Commission
Development Authority of Monroe County	Putnam Development Authority
Development Authority of the City of Jeffersonville and Twiggs County	Warner Robins Convention and Visitors Bureau

Middle Georgia Regional Commission staff also sought out the opinions of stakeholders throughout the process of updating numerous local comprehensive plans in the days leading up to the required CEDS update. The comprehensive plan steering committees of each respective local government in the region also provided useful insight into the economic development challenges of their local communities and were instrumental in completing this plan. Several goals, objectives, and implementation activities were also derived from the Middle Georgia Regional Plan.

The final adoption of the plan by the CEDS Strategy Committee occurred on September 8, 2022, subject to the incorporation of any comments that were received prior to the EDA submission deadline of September 30, 2022.

Background Information

The CEDS for Middle Georgia begins with a review of the region's historical context and an analysis of key data and statistics. This section (as both a CEDS requirement and good planning practice) examines both hard data and stakeholder insights regarding the Middle Georgia economy. In so doing, the CEDS will seek to accurately describe the current state of Middle Georgia and how it got to this point.

Geographical and Historical Context

Middle Georgia's history has been greatly defined by its strategic location in relation to the State of Georgia and the Eastern Seaboard. Middle Georgia stretches across the Fall Line, which roughly bisects the district running from east to west. As is typical throughout the nation, the intersection of the Fall Line with major bodies of water served as a natural crossroads where people came together, and communities were created. In the case of Middle Georgia, this truly dates back over 17,000 years of continuous settlement, going back to the earliest settlements of Native Americans.



*Photo 1: Georgia's Old State Capitol in Milledgeville
(Photo credit: Georgia Military College)*

More recently, the City of Milledgeville became the first major settlement along the banks of the Oconee River and was designated as the state capital in 1804. Other towns and cities, including Macon, emerged throughout the antebellum period with agriculture (particularly cotton) and the movement of agricultural products as primary drivers of the economy. Again, it was the region's geography—providing it with rich soils and effective transportation access that allowed it to grow throughout much of the late 1800s and early 1900s. In the more rural portions of the region, cotton remained the most significant crop until the boll weevil infestation forced many farmers to abandon growing cotton.



Photo 2: View of Cotton Avenue in Downtown Macon, ca. early 1900s (Photo Credit: Wikipedia)

In the years that followed, a variety of other industries took hold throughout the region. Dairy farming and timbering grew into major industries, particularly in the rolling forested hills of Putnam and Monroe counties. Kaolin mining became the dominant industry along the eastern stretches of the Fall Line, particularly in Twiggs and Wilkinson counties—among the few places in the United States where Kaolin can still be found. Farming continued throughout the southern parts of the region, where Fort Valley became “The Peach Capital of The World,” and manufacturing began to take hold throughout Macon.



Photo 3: KaMin, which recently located its Global Headquarters in Twiggs County, is one of the largest kaolin mining and manufacturing companies in the world. (Photo Credit: KaMin)

The region’s largest current employer arrived in the small town of Wellston in 1941, following regional lobbying, to bring an army air depot to Middle Georgia. When World War II began shortly thereafter, the Warner Robins Army Air Depot rapidly grew, with the neighboring town itself changing its name to honor General Augustine Warner Robins, the father of logistics in the modern U.S. Air Force. The City of Warner Robins and many neighboring communities throughout the area grew rapidly in the post-war era to support the base and to take advantage of employment opportunities.

In more recent years, these same sectors of the economy have remained major contributors to employment and well-being throughout Middle Georgia; however, significant challenges have emerged as the region’s economy changes for the 21st Century. Jobs have declined in the traditionally large sectors due to factors such as globalization, automation, and shifting of resources and opportunities to other parts of the country. Agriculture and kaolin mining have both been in steady decline for quite some time. The manufacturing sector has generally followed a downward trend, marked by major plant closures like Brown and Williamson in 2004 and Rheem Manufacturing in 2009. Likewise, Central State Hospital began closing in 2010, and Plant Brant, a major coal-fired power plant on Lake Sinclair closed in 2015. There are most certainly significant opportunities for new business in Middle Georgia because of these many changes. However, our competition for these gains is now global.

The region also continues to face challenges, with many areas experiencing high rates of poverty and under-employment. Economic recovery in Middle Georgia from the Great Recession fell behind the pace of recovery at both the state and national levels, shown by persistent slower wage and employment growth. Middle Georgia finally began to catch up with the rest of the state in its unemployment rate in the late 2010s, but wages continue to fall short.

The region has recovered well from the economic impacts of the COVID-19 pandemic; however, it has not been able to make meaningful strides to close the gap in employment gains (as measured by labor force participation rate) and wages made by the state and nation since the Great Recession. In preparation for future economic downturns, a focus on diversifying local economies has started to make progress, but more work remains, particularly for the areas surrounding Robins Air Force Base (RAFB).

With this in mind, the time is right for investment to take advantage of changing global market trends to grow Middle Georgia's economic prosperity. As the nationwide and worldwide economies adjust to the lessons learned from the COVID-19 pandemic, the region has resources to capitalize on shifting the priorities of employers and the workforce. While many undeveloped industrial parks lack adequate infrastructure for rapid development, the region's central location and easy access to the interstate system (I-75 and I-16), Hartfield International Airport, and the Port of Savannah give the region a competitive advantage over many other regions, especially as the global supply struggles and prioritizes efficiency.

Statistical Overview

Much of the changing historical context of the regional economy has led to new challenges and necessary adaptations; a variety of these challenges remain today. An analysis of demographic data in Middle Georgia reveals a region that often struggles with persistently high rates of poverty, particularly when compared to the state and nation at large. Many parts of the region's public education system continue to be perceived as falling behind other regions, resulting in barriers when Middle Georgia seeks to be on the cutting edge of the latest innovative technologies and practices. While there are certainly opportunities to be seized, there is a clear and present need for concentrated economic and community development, given many of the statistical indicators presently seen in Middle Georgia. The data tables in the Appendix provide raw numbers for the trends and themes discussed below.

Demographic Trends

For the first time, the 2020 Decennial Census reported a population of over 500,000 in the 11 counties of Middle Georgia. This represents an ongoing trend of modest growth that is expected to continue through the first half of the 21st Century, adding about 100,000 people by 2050. Table 1 provides additional projections of the county and regional population. Most of this growth is projected to primarily occur in the urban and suburban counties of Houston, Jones, Putnam, and Monroe. The more rural counties are generally expected to remain relatively steady in population, with some experiencing a slight decline. The population is also expected to age, as illustrated by Table 2, but at a much slower pace in future years. As the aging of the regional populace continues, more and more employees will begin to near the age of retirement, which may drain the supply of qualified and skilled workers. Overall, the Middle Georgia counties are projected to age at a slower rate than the nation and state at large; however, most counties already have a significantly older population than the state or nation. This means that the aging workforce remains a challenge that Middle Georgia will need to confront—particularly when it comes to the specific needs of filling positions that are opened by retirements and ensuring that enough workers are present in the service sectors to meet the needs of older residents.

Socioeconomically, the region is exceptionally diverse. The Georgia Department of Community Affairs ranks each county in the state on an annual basis by their relative levels of economic well-being and distress. This range in Middle Georgia goes from the 19th most distressed county to the 18th most prosperous county out of 159 counties in the state. Table 3 lists the relative standing of each county as ranked for the state's determination of job tax credit eligibility. Over the past 50 years, wages throughout Middle Georgia have steadily grown; however, Middle Georgia has stayed somewhat behind the rest of the state and nation throughout this entire period, with the gap accelerating since approximately 1990. Table 4 indicates this rate of growth. Today, average wages throughout the region are approximately \$16,000 less than the national average, representing one of the larger statistical gaps within the nation.

Related to the lower wage rates in the region, median household incomes are also considerably lower throughout Middle Georgia compared to the State of Georgia or the nation. Two counties have income and poverty rates comparable to the national average: Houston, and Jones. These are the same counties that are expected to see the greatest population growth in the years ahead. As Table 5 shows, almost one in five Middle Georgians are living below the federal poverty level, which illustrates the need to grow economic prosperity throughout the region. Statistically, the region has seen modest improvement in the past few years, with about half the counties in Middle Georgia now having a poverty rate compared to the state average. However, poverty remains highly concentrated in certain parts of the region, making alleviation of poverty an essential focus of economic development.

Education and Labor Force

Within Middle Georgia, Macon-Bibb County serves as the largest employment hub for the region, as over 50,000 individuals regularly commute into Macon-Bibb County to reach their primary jobs. Houston County, the region's other urban county also has a significant number of jobs, including the region's largest employer, Robins Air Force Base. Table 6 shows the commuting patterns of each county in the region, including the daily inflow and outflow of workers. These two counties combine for about 155,000 of the 211,000 jobs in the Middle Georgia region.

The American Community Survey contains a five-year average of labor force participation and unemployment, which can be found in Table 7. The five-year averages show Middle Georgia maintains an unemployment rate slightly higher than the remainder of the state and the nation. This is due to a slow recovery from the Great Recession; however, this gap has narrowed in recent years, and employment has fully recovered from the economic impacts of the Covid-19 pandemic. Using the most recent data from the Georgia Department of Labor, the Middle Georgia region had an annual unemployment rate of 3.2 percent from July 2021 to July 2022, lower than the 5.2 percent annual unemployment rate from July 2020 to July 2021. The region also maintained a seasonally unadjusted



Photo 4: WorkSource Macon-Bibb and WorkSource Middle Georgia partner together to ensure that employers and job seekers throughout the region can connect with one another and secure meaningful employment.

unemployment rate of 3.2 percent in July 2022, compared to 2.9 percent for the state and 3.8 percent for the nation. It is also worth noting that the region's labor force participation rate also remains below that of the state and nation but has notably increased since 2017. When considered in the context of employers having greater challenges in filling vacancies, this data point becomes one worth continuing to monitor closely.

Participation in the labor force and unemployment rate also has a strong correlation with educational attainment, suggesting that those with a higher level of education are more likely to participate in the labor force and be actively employed. Many studies have also shown that these individuals will likely earn higher incomes throughout their careers. With this in mind, Tables 8 and 9 show information about the educational attainment of the Middle Georgia populace. As the data indicate, the region is behind the remainder of the state and nation in terms of educational attainment. For example, only 22.5 percent of Middle Georgia residents over the age of 25 have either a 2-year or 4-year degree; however, 28.9 percent of Americans at large hold the same. There has been some meaningful progress in closing the educational attainment gap, as the percentage of the population with no high school diploma (or equivalent) in the region, 11.8 percent, is about equal to the national level, 11.5 percent. These data may speak both to progress made by the local education system, and the problem of brain drain, with highly educated individuals deciding to leave the region for what they consider to be greener pastures.

Table 10 illustrates the graduation rates of high school students across the region, which rival the statewide rate. As of 2021, only 7 of the region's 20 traditional high schools fall below the state graduate rate, including 8 of the 11 school systems that are outperforming the state in high school graduation rates. One important factor to keep an eye on is the effect the Covid-19 pandemic had on education. Table 11 shows the college and career readiness indicator score and percent of graduating students who graduate having earned some college credit. Many high schools in the region saw a significant decline in the percentage of students graduating with college credit. However, these changes were not consistent, as the more suburban counties that are projected to gain population saw an increase or stayed relatively consistent, while the more rural and urban districts saw a decline. It is important to note that the statewide rate of students graduating with college credit also declined.

Looking in the long term, literacy remains a concern for the region. Only three school systems (Houston, Jones, and Monroe) outperformed the state on measures of third grade reading level, as seen in Table 12. Not surprisingly, these counties tend to score the highest on economic well-being and are projected to attract the greatest number of new residents in the upcoming years. Rates of illiteracy also typically exceed the state and national averages among the adult population, particularly in the rural areas of the region, as seen in Table 13. Overall, this lack of reading skills can have negative impacts on the workforce making it harder to break the cycle of persistent intergenerational poverty. The metric of third grade reading level is particularly noteworthy, as that typically represents the point at which students transition from learning to read into reading to learn. Students that fall behind at this point are more likely to fall even further behind in the following years as their lack of reading skills leads to trouble comprehending future lessons.

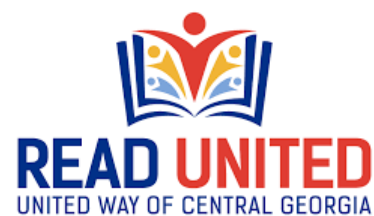


Photo 5: Read United currently supports 25 schools throughout Middle Georgia to help students read at a third-grade level.

Housing

Housing serves as a chief indicator of a community's economic vitality and quality of life. As the Middle Georgia region's population grows and as its economy develops, its housing stock must be maintained, grown, and redeveloped to ensure residents of the region have the shelter necessary to prosper. To effectively measure housing, it is important to not only study the quantity of housing but also its quality, availability, affordability, and placement. The challenge of the community is to create an environment that will spur positive housing development to meet the needs of the community. According to the 2020 American Community Survey, as shown in Table 14, most homes in Middle Georgia are single-family stick-built units. This is similar to the national average, but the region has relatively fewer apartments and multi-family units. Instead, in many of Middle Georgia's less populous and more rural counties, manufactured homes form a high percentage of the available housing stock, including nearly 40 percent of all homes in Twiggs County.

Housing is generally affordable in Middle Georgia, as the median home values in all 11 counties fall below the state and national median, shown in Table 15, with more data on this topic. The lower medians come at the expense of a "missing middle" according to many local economic developers and stakeholders. These types of homes are attractive units that typically characterize a moderately dense walkable neighborhood with affordable but non-subsidized units for students, young professionals, and the working class. The demand seemingly exists for these types of homes within Middle Georgia, but it currently appears that the supply has not yet found ways to meet the demand.

Housing condition is generally good in Middle Georgia (Table 16), although a lack of home internet access remains a challenge (Table 17). This is especially relevant in rural communities, although many of these areas are expected to receive expanded broadband service as state and federal grant funding has been awarded to local service providers to expand service to unserved or underserved areas.

Industry Cluster Analysis

Across the region, total employment has increased since 2001 outside of brief declines due to the Great Recession and the recession caused by the Covid-19 pandemic. Despite these setbacks, total employment in the region grew by over 30,000 jobs from 2001 to 2020; with a number of employment changes as the economy adjusts to shifting trends. This has occurred both within the various employment types, as well as within the major industries of the region. Data obtained from the Bureau of Economic Analysis tracks these changes and can be found in Table 18.

In terms of employment type, traditional wage and salary employment have held relatively steady in the past 20 years. Nearly all new employment growth has come from an increase in the number of proprietors, although this growth has slowed over the previous five years. This represents a tremendous opportunity for small businesses to play an increasingly significant role in the marketplace. To effectively harness these opportunities, local and regional infrastructure to support investments in entrepreneurship will be required. This includes educational opportunities that focus on business development, as well as small business incubators and makerspaces where individuals can experiment with new technologies and ideas.

Among private sector employment, the wholesale trade and manufacturing industries shed the greatest number of jobs since 2001. The wholesale trade sector has seen employment decline by over 70 percent since 2001. Employment in the sector peaked in 2008 but has steadily declined since then. The manufacturing sector is another sector that has experienced a significant decline, albeit at a slower rate over the previous couple of years. The information sector, which includes media and publishing, has seen a decline, particularly in urban areas.

Fortunately, many of the jobs lost within the region have been offset in some other sectors of the economy. The healthcare and social assistance sector has added the greatest number of jobs since 2001, with over 11,000 new employees, which is likely in response to national trends of an aging populace. With two major hospitals, Atrium Health-Navicent and Piedmont Macon Medical Center, as well as several smaller hospitals around the region, Middle Georgia can serve as a hub for those outside of the region's 11 counties.

In addition, the transportation and warehousing sector is a prime area for growth due to the region's strategic geographic position within the transportation system of the state. This sector has experienced the greatest percentage-based job creation, with over 500 percent growth in employment since 2001. Administrative and waste management services is another industry that has seen consistent growth since 2001. Table 19 shows the projected occupation growth that Middle Georgia will likely see in the next six years. As noted above, the healthcare and transportation industries are expected to see growth, as well as other industries.

Innovation

A final important measure for the Middle Georgia region is its capacity for innovation. Tables 20 and 21 provide an overview of the region's innovation index, both on a county-by-county basis, as well as on a regional basis. Since 2017, the region has improved its innovation environment from the 15th percentile of economic development districts nationally to the 38th. While the composite index is good for eighth among Georgia's economic development districts, this represents a very low bar, with several Georgia districts having among the lowest innovation capacities in the nation.

Regional innovation capacity is based on several factors, including human capital and knowledge creation, business dynamics, business profiles, employment and productivity, and economic well-being. Middle Georgia fairs moderately well in human capital measures, business profiles, business dynamics, and employment and productivity. However, it tends to lag in other economic well-being.

The factor that has seen the most growth over the previous five years is the business dynamics of the region, which is a measure of the competitiveness of businesses. The region's index score increased from 44.6 to 119.1, changing from the region's biggest innovation weakness to its greatest strength. Middle Georgia scored particularly high in one factor; the number of employment gains contributed to business expansions compared to employment losses attributed to contractions, which the Middle Georgia region ranks 38 out of all economic development districts nationally. The measure that the region scored the highest in is patent technology diffusion, which is an original calculation that measures the degree to which a technology spreads and is adopted. In other words, it is a measure of the region's volume of patents. Middle Georgia ranks 22 out of the economic development districts in this measure.

The significant weakness of the region's innovation index is the compensation component of economic well-being. The Middle Georgia region ranks 351 out of the 384 economic development districts. Growth in earnings and income has been exceptionally slow in Middle Georgia compared to other regions among both proprietors, as well as in traditional wage and salary employment. In addition, the region scores low in residential internet connectivity. With recent grant awards in the region to expand broadband service, it can be expected that the region's score will improve in the coming years.

A focus of the 2017 CEDS was to grow economic resiliency by diversifying the economy. The Middle Georgia region now ranks high in industry diversity, but this comes at the expense of low industry cluster growth and strength. This could be due to the traditionally dominant industries of the region, nonmetal mining (typically kaolin), forestry, and paper and wood products which have seen declining employment. Notably, Middle Georgia is among the slowest growing regions in the nation in the measure of change in GDP per worker. This stagnation represents another challenge to improving the region's capacity for innovation.



Photo 6: The Middle Georgia Innovation Project, launched in 2021 seeks to build upon the region's potential for entrepreneurship and commercialization of new technology.

Taken together, the innovation statistics show a clear need to continue to be forward-thinking in creative ways to support regional entrepreneurship and grow economic prosperity. While many factors may be beyond the control of regional decision-makers, the advantages of Middle Georgia's higher education system and competitive business environment can lead the way.

Reference Plans for Further Reading

While data tables for the above statistics can be found in the appendix of this plan, several other planning resources are available to provide additional in-depth statistical insight on the current trends, economic opportunities, and financial impacts within the region. Some were drafted by Middle Georgia Regional Commission staff, and others were produced by outside consultants.

- » Middle Georgia Regionally Important Resources Plan (2010)
- » Middle Georgia Freight and Logistics Study (2015)
- » Plan for... A Thriving Middle Georgia (2016)
- » Middle Georgia...Growing Strong report (2016)
- » Diamond in the Rough (2017)
- » Middle Georgia Air Strategic Plan (2018)
- » Middle Georgia Charrette and Regional Planning Initiative Action Plan (2018)
- » Master Plan for Middle Georgia Intermodal Hub (2019)
- » Middle Georgia Innovation Performance and Gap Analysis Report (2021)
- » Middle Georgia Innovation Roadmap Report (2021)
- » Middle Georgia Innovation Corridor Report (2021)
- » Middle Georgia - Robins Air Force Base Sustainability Plan (2022)
- » Region 6 Workforce Development Plan (2022)
- » Various local comprehensive plans (2018-2022)

SWOT Analysis

A SWOT Analysis reviews the various **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats that may be present in the region. In most instances, the strengths and weaknesses refer to positive and negative factors that are internal to the community. Opportunities and threats would be the positive and negative forces (respectively) that work on the community from an external perspective. In other words, conditions that are not fully within the control of the community but are nevertheless an important factor in future development. The lists below were based on the SWOT analysis from the 2017 CEDS with updates provided by stakeholders in 2022.

Strengths

The Middle Georgia region has a variety of strengths, generally including its transportation infrastructure, natural and cultural resources, and institutions of higher education. The lists below were developed in consultation with regional stakeholders who noted several high points; this list is not meant to be all-inclusive. The concept of strengths generally includes features that are beneficial to the region, and that typically, can be influenced to some extent by local governments; these are the things that make Middle Georgia a good place to live and do business.

Education

- » Numerous Colleges and Universities
- » Central Georgia Technical College
- » MERC, ATTC, and Specialized RAFB Training
- » Improvements in K-12 Education, Including College and Career Academies, and Developmental Programming like Leader in Me and Read United.

Natural and Cultural Resources

- » Ocmulgee Mounds National Historical Park
- » Georgia National Fairground
- » National Forests, State Parks, and Wildlife Refuges
- » Abundant Rivers and Lakes
- » Plentiful Land for Future Development
- » Numerous Local Community Festivals
- » Rich Musical, Artistic, and Historical Heritage
- » Museum of Aviation
- » Agribusiness
- » Historical Downtown Developments



Photo 7: Students touring the Ocmulgee Mounds National Historical Park. (Photo Credit: NPS)

Regionalism

- » Improved Cooperation in Middle Georgia

Significant Employers

- »» Robins Air Force Base
- »» Hospitals/Healthcare Industry
- »» Warehousing and Distribution
- »» Colleges and Universities

Transportation

- »» Strategic Central Location with Access to Ports, Major Roadways, and Rail
- »» Multiple Regional Airports

Utilities

- »» Watersheds and their Water Supply
- »» Growth of Solar Generation and Power Capacity



Photo 8: Javors Lucas Lake is the region's largest reservoir. Middle Georgia has abundant water supply resources, providing long-term security to the region. (Photo Credit: MWA)

Weaknesses

With strengths for the region, naturally, weaknesses are also present. Some of these factors may draw business away from Middle Georgia, but generally, these are areas where local leaders have some ability to enact positive change. Transportation systems sometimes have gaps and congestion. Utility systems are sometimes prone to failure. Among the most significant weaknesses is the lack of high-speed internet access across the region. Similarly, the presence of a skills gap in the workforce is a major issue. These are not all-inclusive of the potential weaknesses and challenges facing the region but mostly cover the largest challenges.

One additional challenge is an occasional lack of statistical data. Because so many measures are collected annually or over several years, and often come with a lag, it may be difficult to see the quick-moving changes in the regional economy (for good or for bad). While the full extent of this challenge is unknown, it is also worth mentioning as a potential weakness, though there is little that can be done by the region itself.

Community Development

- »» Brain Drain Occurs in Many Communities
- »» Quality of Life and Quality of Jobs Might not be High Enough to Entice Young Workers
- »» Inadequate Housing Supply (Both Cost and Variety)

Education and Employment

- »» More Improvement Needed in K-12 Public Education and a Negative Stigma Remains for Some Schools
- »» Education Systems Perceived to be Working in Silos
- »» Skills Gap Between Workers and Jobs Available
- »» Companies Struggling to Recruit and Hire Workers

Regionalism

- »» Often in Competition with Atlanta Region

Transportation

- » Congestion in East-West Transportation
- » Congested North-South Connection to Atlanta
- » Industrial Sites Lacking Transportation Infrastructure
- » Limited Options for RAFB Access
- » Lack of Public Transportation Outside of Macon-Bibb
- » Community Gateways Need Aesthetic Improvements

Utilities

- » Quality, Reliability, and Availability of Utility Service
- » Insufficient Natural Gas Availability
- » Poor Broadband Infrastructure (Especially in Rural Areas)
- » Industrial Sites Lacking Utility Infrastructure



Photo 9: State OneGeorgia funds were recently secured to help address sewer needs at the Griswoldville Industrial Park in Jones County. This is one of many industrial sites that can be enhanced with improvements to the utility infrastructure.

Opportunities

Opportunities for Middle Georgia are based on the occurrence of events, activities, or initiatives that have happened recently, are happening now, or could happen in the very near future. Generally, these are positive developments that can potentially spur new job growth, new lines of business, or improvements to the quality of life within the region. Often, the region may not have internal control over what happens, or that level of control may be only a limited influence. Nevertheless, the opportunities for the region can be significant for their end impact on Middle Georgia. Once again, this list was compiled with the assistance of local stakeholders, and discusses some of the major regional opportunities, but does not represent an all-inclusive list.

Community Development

- » Dedicated Focus on Blight from Cities and Counties
- » Increasingly Vibrant Downtown Areas
- » Expanding Access to Rural Broadband Technologies, Especially with Rural EMC Partnerships

Emerging Economic Sectors

- » Tourism and Film Industry
- » Ocmulgee National Park and Preserve Initiative
- » Software, Aerospace, and Advanced Manufacturing Supported by the Middle Georgia Innovation Project

Regionalism

- » Focus on New Rural Development Partnerships

Robins Air Force Base

- » BRAC – Potential to Gain Jobs and Missions
- » New Off-Base Partnership Facilities
- » Unmanned Aerial Vehicles (UAVs and Drones)

Transportation

- » Major Proposed Transportation Improvements: I-75/I-16 Interchange, GA-96 Widening, Future I-14, and I-75 Commercial Vehicle Lanes
- » Reduce Atlanta Traffic by Sending Through Middle Georgia Instead
- » Savannah Harbor Expansion Project
- » Network Georgia Inland Port Initiative
- » Rail Connection to Atlanta, Other Hub Cities in Georgia, and Southeast
- » Expansion and Enhancement Projects at Regional Airports



Photo 10: GDOT Renderings of Proposed Improvements to the I-75/I-16 Interchange. Improvements are currently under construction and can be expected to improve transportation efficiency, including the movement of freight through the region, and connecting to the Port of Savannah. (Photo Credit: GDOT)

Workforce Development

- » Small Business Incubators
- » CGTC Academy
- » Be Pro Be Proud
- » Living in Middle Georgia Initiative
- » Large Labor Market Area for Prospective Employers

Threats

Lastly, with opportunities for the region, also come threats. Like the opportunities, these threats may not be easily controlled by leaders within the region, but they still pose a challenge in the future for the recruitment of new businesses and industries. Perceptions of run-down or blighted neighborhoods or perceptions of high crime can drive companies away. There are also many threats to the workforce: the persistence of a skills gap, drug usage (which makes it harder for businesses to find employees), and a loss of talented individuals to retirement or other parts of the state. Finally, base realignment and closure may be another significant threat in the future.

Blight

- » Pockets of Blight and Run-Down Neighborhoods
- » Contaminated Brownfield and Greyfield Sites
- » Perceptions and Instances of Crime

Defense Industry Realignment

- » Loss of Defense Contracts
- » BRAC – Potential to Lose Missions and Jobs

Economic Diversity

- » Lack of Economic Diversity in Many Communities
- » Potential Loss of Anchor Employers

Transportation

- » Lack of Public Transit Access

Utilities

- » Unsatisfactory Access to Broadband
- » Inability of Infrastructure (Water, Sewer, Gas, Solid Waste, etc.) to Match Pace of Growth

Workforce

- » Skills Gap Between Workers and Jobs Available
- » Lack of Employees to Meet Employer Needs (Especially at Less-Desirable Times/Conditions)
- » Changing Employee Priorities
- » Retirements and Loss of Institutional Knowledge
- » Perception of a Small Labor Market Area
- » Unavailability of Workforce Housing
- » Drug Use and Addiction
- » Inadequate Mental Health Resources



Photo 11: The region's technical colleges, universities, and K-12 education systems will all be key partners in mitigating the workforce threats that many stakeholders see in the region's future. (Photo Credit: CGTC)

Strategic Direction for 2022-2027



Photo 12: Lt. Gen. Gene Kirkland speaks with Representatives Sanford Bishop and Austin Scott during the ribbon cutting ceremony for Project Synergy. (Photo Credit: Robins AFB)

In March 2021, the deadliest winter in the COVID-19 pandemic had just come to an end in Middle Georgia. Searching for a bright spot in the region's economic future may have seemed a difficult task at the time, but leaders from across the region managed to come together for a major celebration that pointed toward the region's future. It was in March 2021 that Project Synergy, the largest off-base software operation for Robins Air Force Base, held its ceremonial ribbon-cutting. As top Air Force brass from around the country came to Warner Robins, it was a cause for excitement as Middle Georgia was setting its course on a new economy that would run on technology and innovation.

The strategic direction for this Comprehensive Economic Development Strategy focuses on the pillars of **Living + Innovating + Thriving** in Middle Georgia. The following section will highlight general goals related to our current strengths, weaknesses, opportunities, and threats. In the implementation section, this document will discuss specific ways to meet those goals so that the region is full of living, innovating, and thriving Middle Georgians.

Regional Vision Statement

A thriving Middle Georgia, united by regional pride and mutual respect, where cooperation and collaboration expand the region's economic prosperity, provide an exceptional education for all its residents, and ensure that every Middle Georgian has a high quality of life through the provision of effective local government services and the preservation of natural and cultural assets. In short, a diverse region of opportunity where people want to live, learn, work, and play.

Goals and Objectives

The stakeholder engagement process in the CEDS and related plans have provided several goals related to economic development. These goals all come naturally out of the broader vision for a region where people find the opportunity to enjoy their quality of life while innovating professionally and thriving economically. Many of these goals build up from the 2017-2022 CEDS with some updates and changes. Listed below each goal are a handful of more specific objectives that are related to attaining the regional goals.

Community Development and Blight

GOAL: Middle Georgia is widely recognized as a community that is clean, beautiful, and safe. People want to live in Middle Georgia and young people choose to stay in Middle Georgia or return to Middle Georgia for the region's quality of life.

»» **OBJECTIVES:**

- Clean up contaminated brownfield sites and revitalize greyfield locations that sit vacant without contributing to the aesthetic or well-being of the community.
- Undertake active code enforcement of blighted properties, particularly on major transportation thoroughfares.
- Invest in the clean-up and reinvestment in traditionally disadvantaged communities and dedicate special planning resources to those areas.
- Encourage infill development and provide for smart growth patterns.
- Build community partnerships to address increasing cases of violent crime.

Education, Employment, and Workforce Development

GOAL: Middle Georgia becomes a sought-after community in which to live due to the quality of educational opportunities throughout the region. Prospective workers are successful in obtaining the specialized skills needed in the workplace, and employers can maintain robust employment in quality jobs.

»» **OBJECTIVES:**

- Continue to grow participation in college and career academies to provide graduating high school students with meaningful technical skills.
- Expand opportunities available in apprenticeship and internship programs.
- Enhance soft skills training for prospective employees.
- Specifically, incentivize the location of higher-paying jobs in the region.

Emerging Industries and Economic Diversification

GOAL: The economy of Middle Georgia continues to become more diverse as new industries are attracted to growing sectors of the economy. As a result, more Middle Georgians have high-quality jobs and employment prospects.

»» **OBJECTIVES:**

- Continue to reduce broad regional overreliance on the defense sector, including the support of growth in commercial aerospace and high-tech sectors. Leverage recent investments to spur new economic growth.
- Build strategic partnerships to transition local industries and employers to Industry 4.0 technologies and support the region's innovation ecosystem.
- Increase job opportunities in rural communities transitioning away from agriculture, forestry, and mining.
- Invest in regional high-growth sectors, including healthcare and logistics.
- Work to offset impacts on employment and local tax digests from the closure of coal-fired power plants and units.
- Leverage the growth of clean energy sectors and new electric vehicle manufacturing processes to expand the local economy.
- Continue to support the mission of Robins Air Force Base and ensure the sustainability of operations and military readiness.

Natural Resources, Cultural Resources, and Tourism

GOAL: The region is recognized throughout the state and nation for the uniqueness of its natural and cultural resources. As a result, Middle Georgia becomes a greater draw for tourists who recognize the uniqueness of the region.

»» **OBJECTIVES:**

- Invest in activities that develop the tourism product of Middle Georgia by providing quality amenities at points of interest and a wide variety of experiences.
- Leverage growth in the film and tourism sectors of the economy to create new jobs in the community and invest in community development.

Regionalism

GOAL: Middle Georgia leaders share a “Center-Georgia United” mindset that prioritizes strong regional collaboration in support of a diversified regional economy.

»» **OBJECTIVES:**

- Continue to support forums and initiatives to build interest in collaboration.
- Frame regional opportunities through the lens of equity for rural and traditionally disadvantaged communities.

Transportation

GOAL: Communities across Middle Georgia are well connected and benefit from a multimodal transportation network that meets the needs of all its users and serves to expand economic opportunities throughout the region.

»» **OBJECTIVES:**

- Improve east-west transportation and shipping routes.
- Provide additional access to efficient public transportation.
- Secure an inland port within the Middle Georgia region.
- Enhance rail accessibility for industrial parks and stimulate the growth of Middle Georgia in national rail and freight transportation networks.
- Promote opportunities for passenger rail connectivity to Atlanta and Savannah.
- Enhance aerospace assets, including Middle Georgia Regional Airport.

Utility Services

GOAL: All Middle Georgians have access to quality and affordable utility services to ensure a basic quality standard of living regardless of one’s neighborhood or zip code.

»» **OBJECTIVES:**

- Facilitate expansion of broadband internet services, particularly in rural areas and in support of community facilities and major employers.
- Ensure adequate capacity of public water, sewer, and natural gas services.
- Invest in maintenance and upkeep of county and municipal utility systems.
- Extend service to present and future industrial sites.
- Ensure adequate waste disposal and recycling capacity.
- Invest in grid upgrades to meet the demands of a future driven by electrification.

Regional and Local Action Plans

The action plan of the CEDS details the highest priority projects that are essential for continued work toward economic prosperity within the region. This element of the plan is broken down into regional activities and local activities. Many of the regional priorities would also be priorities for most of the counties within Middle Georgia. Each of these activities should be items that are realistically accomplishable by the Middle Georgia Regional Commission or by a local government of the region, provided that requisite support and cooperation are present from partner entities, such as boards of education or private businesses.

Regional Activities

Regional projects for Middle Georgia are listed under one of nine larger initiatives. These are based on the outline from the 2017-2022 CEDS and have been expanded on or modified where necessary for the region.

Living + Innovating + Thriving

Connecting a Skilled Workforce with Quality Jobs

- »» Develop fab labs, makerspaces, and small business incubators.
- »» Support further growth and enhancement of college and career academies.
- »» Identify new apprenticeship, internship, co-op, and work-study opportunities.
- »» Support transitioning veterans and the activities of the VECTR Center.
- »» Retain talented workers and college graduates in Middle Georgia.
- »» Teach soft skills to students and prospective employees.
- »» Train for growing career opportunities.
- »» Recruit a portfolio of sustainable and high-paying jobs to the region.
- »» Equip workers with tools to effectively manage their financial resources.
- »» Assist employers with navigating challenges of new work habits that have developed following the COVID-19 pandemic.
- »» Grow the overall size of the regional workforce.

Five years ago, the CEDS detailed a skills gap that existed in the workforce. In many ways, those conditions persist today, as not all workers have the skill sets required to fill many of the in-demand jobs in the manufacturing, logistics, healthcare, and technology sectors. The greatest shift has gone from this being particularly harmful to workers to being even more harmful to employers. The challenges that employers are finding at all skill levels (including unskilled entry-level work) seem to indicate that even while a skills gap remains, there is an overall shortage of workers, regardless of training or experience. In May 2018, the region's monthly unadjusted employment rate dipped below 4.0 percent for the first time in more than a decade. Leading up to the COVID-19 pandemic, these rates remained historically low, and they have since returned to those historic numbers following the initial economic shock of the pandemic. Combined with the impact of retirements as the region's median age increases, companies must plan for these workforce challenges to continue to some extent.

Ultimately, the process of connecting skilled workers with quality jobs requires give and take from both the public and private sectors. Public support for fab labs, makerspaces, and college and career academies will provide individuals with spaces to learn technical skills, even as students in the K-12 education system. Students who graduate with technical competencies will find themselves more likely to land lucrative jobs. Employers can also bear their share of the burden by making additional apprenticeship and internship opportunities available to young prospective workers. While this is an initial cost for many businesses, if done successfully, it becomes a worthwhile long-term investment. Finally, regional employers may need to adopt greater flexibility than in recent years regarding their new hires. Both higher rates of pay and more flexible working conditions are incentives that can put one company ahead of another for attracting talented individuals, even as the workforce development partners of the region work to make up that difference.

Investing in Infrastructure

- » Expand broadband internet access.
- » Provide adequate water, sewer, electrical, and natural gas capacity for industry.
- » Provide reliable, quality community utility services, especially water and sewer services.
- » Ensure adequate solid waste disposal and recycling capacity.
- » Increase transportation options and connectivity for residents and visitors.

The regional activities for infrastructure remain somewhat unchanged since the 2017 CEDS. This is not an indicator of lack of success or attention being paid to those issues, but more so evidence that the region's infrastructure needs run deep. The greatest need continues to be broadband internet access, especially in rural communities. The low density of population in many communities has not traditionally made it cost-effective for private entities to supply high-speed internet access throughout rural areas. This did not make high-speed internet any less of a need in rural communities, as was made painfully obvious by the COVID-19 pandemic. With that said, rural Georgia is now experiencing the type of investment not seen since the days of rural electrification, and it is being driven by the same partners: rural electric cooperatives. Changes in Georgia law, combined with massive federal investments through the Federal Communication Commission Rural Digital Opportunity Fund and the provisions of the American Rescue Plan Act of 2021 have given a tremendous boost to rural broadband efforts. If the momentum that currently exists today continues over the next several years, the 2027 CEDS will result in a markedly more positive conversation.



Photo 13: Executives from Flint Energies and local leadership from across their 17-county region gathered with Governor Kemp in March 2022 to announce plans to expand internet service for over 31,000 unserved and underserved customers within the Flint service area. The total investment in new fiber will be approximately \$90 million and will allow the cooperative to run more than 3,000 miles of fiber-optic cable throughout parts of rural Georgia. (Photo Credit: State of Georgia)

Beyond the broadband needs, many communities lack the density to support the water or sewer improvements that are necessary to attract new investments in industry or business. This also impacts the quality of life, as residents may lack access to reliable and quality services. Many funding streams have already been made available for local governments to enhance services like water and sewer. Applying for those grants and loans is a continued priority for many communities, especially in low-income neighborhoods.



Photo 14: Senator Jon Ossoff announces a \$6.3 million Congressionally Directed Spending Request that was approved for the City of McIntyre in March 2022. The grant funding will allow McIntyre to complete the community's first public sewer system after more than 30 years of work. (Photo Credit: 13WMAZ News)

Finally, the needed investments in infrastructure also include the transportation network. While standard maintenance and upkeep are always important, a particular premium should also be paid to the expansion of multimodal infrastructure for residents and tourists alike. It is more common for communities to value walkability and mobility through a variety of sources (including public transit) as values within a community. These improvements benefit livability for all members, especially those who do not have access to a personal vehicle. This is important at the local level, but also presents an opportunity at the regional and intercity level. Currently, the I-75 Central Corridor Coalition is working to promote transit-oriented development and smart growth between the Atlanta and Middle Georgia regions. This includes a discussion of passenger rail connecting the communities, which should remain a topic of interest.

Advancing Our Communities

- » Provide quality, affordable housing for all segments of the population.
- » Remediate blight and invest in rebuilding deteriorating neighborhoods.
- » Redevelop downtown areas to promote vibrant communities.
- » Clean up and redevelop brownfield sites and greyfield areas.
- » Improve community entrances and gateways.
- » Actively market and promote the quality of life in Middle Georgia.

Another key element for regional economic development is the promotion and enhancement of communities themselves as neighborhoods, cities, and spaces where people actively want to live. This starts with having clean and attractive streets, homes, and businesses. Many local governments throughout Middle Georgia have made a concerted effort to identify and remove blighted structures in recent years. In places like Macon-Bibb County, several nonprofits and authorities have been actively engaged in blight remediation, and the community has invested a large amount of public funding into the effort. Other communities, especially rural cities and counties with fewer resources, may continue to struggle with the presence of these structures if unable to invest significantly in remediation. Then the challenge remains in each community of how to rebuild without leaving gaps behind in the fabric of the community. Cities and counties can directly do this with specific corridor beautification efforts and through targeted grants for brownfields, but the challenge is much greater throughout the larger community.

The blight in many residential neighborhoods is also part of the housing challenge that is gripping communities throughout Middle Georgia. Professionals working in economic development are noting with increasing frequency that businesses are struggling to find adequate housing for their workers. In many cases, these homes may exist and are simply too blighted to be reasonably rehabilitated into livable condition for a new owner. In other cases, however, the housing market is failing to provide the affordable housing that residents desire. The term “Missing Middle” housing was once relegated to classrooms and think tanks but has recently become accepted throughout the United States as an acknowledged need for homes that are more affordable than traditional single-family homes while still allowing for ownership or rental options for income earners who do not qualify for programs like the Low-Income Housing Tax Credit (LIHTC). While demand still exists for LIHTC units too, the Missing Middle remains something that communities can work toward. Several communities are also undertaking dedicated housing plans through the Georgia Initiative for Community Housing.



Photo 15: Diagram showing examples of "Missing Middle" housing. (Photo Credit: Opticos Design)

While the region's housing stock is one important contributor to quality of life, the vibrancy of downtown areas can also be important. Since the 2017-2022 CEDS was completed, significant progress has been made in this arena. Macon-Bibb County has been the most active downtown in Middle Georgia for several years and has recently added its first downtown hotel in many years. Smaller cities have also launched engaging downtown event series like Perry's Food Truck Friday, which regularly draws several thousand visitors to downtown. A continued focus on downtown revitalization will be good for several reasons. First, by adding more sustainable

development patterns, the cities of Middle Georgia can attract downtown housing investments that improve the economic well-being of the local shops and services. As an added effect, the presence of residents, businesses, and tourists remaining on the streets is critical to establishing safety in the community. Violent crime rates have risen in many parts of the nation, and Middle Georgia is not immune from these challenges. Both organized community policing efforts, as well as the more nuanced development of communities as desirable places, will have the effect of making people feel safer by being in communities where others want to be. Moving forward, an intentional focus on marketing Middle Georgia as the kind of place where people do want to live can have a positive impact not only on the continued growth and development of communities but also on the ability to recruit and retain workers who will choose Middle Georgia as their preferred place for living.

Living + Innovating + Thriving

Sustaining Robins Air Force Base and the Defense Industry

- » Implement study recommendations from the 2022 Middle Georgia – Robins Air Force Base Sustainability Plan.
- » Continue to address encroachment of non-compatible uses with Robins Air Force Base.
- » Support investment in STEM education with an eye toward Robins Air Force Base as a center of excellence in software engineering for the Department of Defense.
- » Preserve attainment of regional air quality standards for ozone and PM2.5.
- » Address weaknesses identified in the Middle Georgia Readiness Analysis.
- » Support mission and activities of 21st Century Partnership.



Photo 16: Ribbon cutting at the Blue Sky Software Lab in February 2020 (Photo Credit: Macon-Bibb County)

Sustaining the defense industry of Middle Georgia, particularly that centered around Robins Air Force Base, is essential to the continued economic viability of many parts of the region. With over 23,000 employees, RAFB is by far the region's largest employer, and the loss of those jobs and contract opportunities would be the biggest threat facing the region. Local and regional economic development entities have recognized this and have focused intensely on making RAFB the most attractive installation that it can be in the eyes of Department of Defense officials. Over the last five years, significant progress was made in supporting the base. Notably, the Central Georgia Joint Development Authority finalized a project with Georgia Power to provide solar power to the base and community on the encroachment lands north of the runway. Leaders invested in several new off-base facilities to support the installation. These include the Robins North facility at the Middle Georgia Regional Airport in partnership with Central Georgia Technical College and the Macon-Bibb County Industrial Authority; the Blue Sky Software Lab in collaboration with Mercer University and Macon-Bibb County; and Project Synergy at The R. Wayne Lowe Synergy Innovation Complex with the support of the Houston County Development Authority, Houston County Board of Education, Houston County Board of Commissioners, and the City of Warner Robins.

Implementing the Middle Georgia Innovation Project

- » Nourish the innovation culture of Middle Georgia by leveraging regional strengths.
- » Encourage the adoption of Smart City technologies by local governments and Industry 4.0 technologies more broadly in the business community.
- » Develop innovation facilities to facilitate connections across the workforce.
- » Implement mobile learning approaches to STEM careers, particularly for service in underserved communities.
- » Accelerate the growth of the regional workforce, particularly in skills related to the adoption of digital technologies.



Photo 17: The Middle Georgia Innovation Project is a key component of the state's funding award.

In early September 2022, the Economic Development Administration announced the selection of 21 regional coalitions to receive Build Back Better Regional Challenge Grants. The State of Georgia was fortunate to receive one of the largest awards in the nation for the development of the Georgia AI Manufacturing (GA-AIM) Coalition, led by the Georgia Tech Research Corporation. Broadly speaking, the purpose of this funding is to accelerate the adoption of artificial intelligence across the state's legacy industrial sectors. In Middle Georgia, this specifically includes a focus on developing a workforce that will be able to lead industrial innovations in software engineering, robotics, and autonomous machines. This will be of particular importance for Robins Air Force Base—hence the role of the 21st Century Partnership in coordinating these efforts throughout Middle Georgia. Other regional partners will include the Middle Georgia Economic Alliance, led by the Houston County Development Authority, Fort Valley State University, and the Middle Georgia Regional Commission. One expected outcome from this investment will be improved talent development and recruitment for Robins Air Force Base—particularly in reference to the new Advance Battle Management System (ABMS) which is replacing the old JSTARS mission on base. ABMS will integrate next-generation command and control systems into a cloud environment—enabling the use of artificial intelligence for faster decision-making in Air Force operations.

Beyond impacts for the Department of Defense, continued support of the Middle Georgia Innovation Project has the potential to stimulate new private sector job growth and improved efficiencies for regional businesses. While the application of Industry 4.0 technologies is very clear in defense and aerospace, other industries such as healthcare are also increasingly relying on tools like augmented reality to train and develop future generations of doctors and nurses. Improvements in cloud computing and analysis of big data can also help to drive innovations and improved performance in the financial sector. While Middle Georgia is far from alone in the adoption of these new technologies, the failure to adapt to the next generation of technologies in business and industry would put the region behind others going into the future. If successfully implemented, this project will position Middle Georgia to advance economically in comparison to its peer regions across the nation. In so doing, individuals may begin to see additional improvements in quality of life and economic prosperity.

Attracting Green Jobs and Investments

- » Leverage the location of new Georgia employers like Rivian and Hyundai to attract related businesses in the supply chain for electric vehicles.
- » Build out infrastructure throughout the region to support the charging of electric vehicles—both at the corridor (DC Fast Charge) scale and the community (Level 2) scale.
- » Consider opportunities to use less-productive land for utility-scale solar power developments in partnership with Georgia Power and Oglethorpe Power.
- » Target recruitment of green jobs and investments with a particular focus on communities adversely impacted by the closure or downsizing of coal-fired power plants.
- » Utilize green building technologies to save taxpayer funds at the municipal level and to create more sustainable development more broadly throughout the region.

Middle Georgia has viewed environmental sustainability as a key part of economic development ever since designation in nonattainment of federal air quality standards threatened the potential to land new missions at Robins Air Force Base. In recent years, the region has seen added benefits from courting investments from landowners who wish to develop utility-scale solar generation facilities within the region. These add power to the grid while also providing a nice boost to the local tax base without increasing demand for services.



Photo 18: This 200 KW_{AC} solar farm in Twigg County went online in 2020 and is currently the largest facility of its kind east of the Mississippi River (Photo Credit: Origis Energy)

Throughout this time, electric vehicles (EVs) also continued to become a more common sight in Middle Georgia. This began as merely a stopping point for cars traveling from Atlanta or elsewhere but has also become a growing trend within the region. The momentum for EVs in Georgia grew with the announcement in December 2021 that Rivian would bring 7,500 jobs and \$5 billion in investment to the Stanton Springs development near Social Circle and Madison. Only six months later, Hyundai followed with an announcement of 8,100 additional jobs with \$5.5 billion of investment in the Bryan County Megasite, located just outside of Savannah. With these two massive deals, Georgia has become a national focal point for EV manufacturing. Federal legislation passed later in 2022 would also layer on tax credits for purchasing EVs while also stimulating investment in the technology that would go into automobile computers. Middle Georgia now sits in a prime position between these two massive employers (as well as Kia in West Point) where the region can host suppliers for any of the major automotive manufacturers. Kumho Tire already fulfills this role in some ways, but with new EVs also requiring battery manufacturing and development of microchips and processors, Middle Georgia could attract the types of major advanced manufacturing jobs that the region has only dreamt of in years prior. With major tracts of land like the Middle Georgia Megasite (Peach County) and Sibley-Smith Industrial Tract (Baldwin County), the region could theoretically support an industry of similar size to Rivian or Hyundai in the new green economy.

Living + Innovating + Thriving

Enhancing the Regional Aerospace Industry

- » Extend the Middle Georgia Regional Airport runway.
- » Upgrade and enhance other local and regional airports.
- » Expand MRO work done in Middle Georgia, especially commercial aviation work.
- » Implement recommendations of the Middle Georgia Air Strategic Plan.
- » Upgrade facilities for fixed-base operators, including particularly the executive terminal at the Middle Georgia Regional Airport.

For a thriving region, the existing major industries must also continue to succeed. This begins with the aerospace industry as another opportunity for continued growth. Due to the presence of Robins Air Force Base, many employees exist in the region who are skilled in aircraft maintenance, repair, and overhaul work. This work is heavily slanted toward defense contracts, which makes the economy more susceptible to major changes in private investment and employment as defense funding ebbs and flows. Adding additional lines of commercial aircraft work would enhance the region's economic resiliency in a quite natural context.

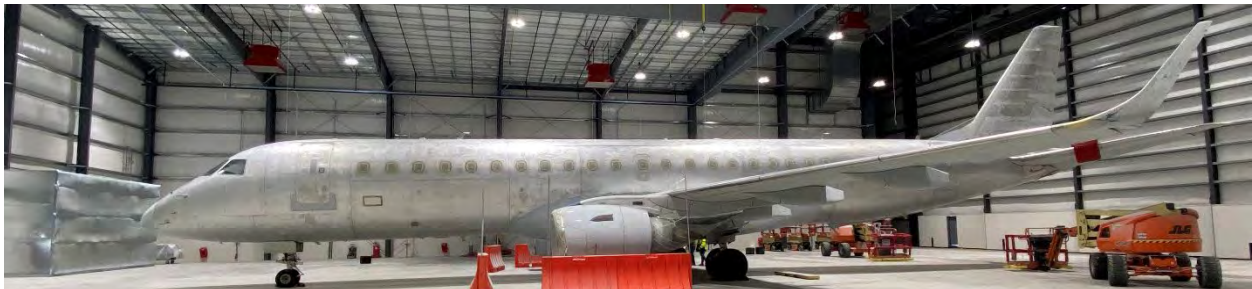


Photo 19: Dean Baldwin Painting began its operations at the Middle Georgia Regional Airport in late 2021.

Currently, the Middle Georgia Regional Airport is the largest in the region and has the largest concentration of aerospace industries surrounding it. Investments to extend the runway at the airport and explore strategic opportunities for further industrial development can have significant benefits to the local and regional economies. The Middle Georgia Air Strategic Plan, prepared in December 2018 has detailed recommendations on many aeronautical and non-aeronautical investment opportunities—including opportunities for additional commercial air travel as well as improvements to facilities at the Middle Georgia Regional Airport. Stakeholders in the CEDS planning process had a particular interest in the fixed-base operator facilities as well, recognizing the importance of those facilities in making a first impression on visitors to the region, which may include future business partners. All told, the airport has many opportunities to continue serving as an important link in the local economy.

Supporting the Freight and Logistics Industry

- » Improve major freight corridors
- » Create truck bypasses as needed
- » Develop an intermodal facility under the Network Georgia initiative
- » Ensure rail accessibility of industrial sites
- » Improve local roads, as needed, to handle freight traffic

Another major project for the Middle Georgia region is taking advantage of the opportunity to grow the freight and logistics industry within the region. In 2015, the Middle Georgia Regional Commission, with the support of local economic development entities, commissioned a study of the logistics capacity of the region, concluding that the industry had significant potential for growth. Not only has this been proven statistically by the increases in regional employment, but it can also be seen anecdotally in the location of major businesses like Amazon. A primary next step for supporting this industry includes continuing regional transportation improvements to support the flow of freight. The truck lanes on I-75 in Monroe County, improvements to the I-16 /I-75 Interchange in Macon-Bibb County, and widening of State Route 96 across Peach, Houston, and Twiggs counties are all projects that can contribute to improved freight movement in Middle Georgia.

Meanwhile, the Middle Georgia Regional Commission also worked with engineers Thomas and Hutton in 2019 to develop master plans at potential sites for a Middle Georgia Intermodal Hub and Container Port. This document identified four potential sites that could support the development of an intermodal facility like the inland ports developed under the Network Georgia initiative of the Georgia Ports Authority. This continues to remain an opportunity for tying Middle Georgia more thoroughly into the state's rail infrastructure to support freight and logistics efforts. Continued communication with both the Georgia Ports Authority and the major railroads in Middle Georgia will be important for this opportunity to come to fruition.

Capitalizing on our Natural and Cultural Resources

- » Support the Ocmulgee National Park and Preserve Initiative.
- » Attract the growing number of RV and outdoor recreation enthusiasts post COVID-19.
- » Expand trails and greenways throughout the region.
- » Effectively support and market all cultural assets and tourist draws of the region.
- » Capture tax revenue appropriately from the short-term rental market.
- » Leverage Camera Ready and Georgia Grown programs.

Outside of the industrial sectors of the economy, Middle Georgia sees significant opportunities for tourism to help the region thrive by highlighting the unique qualities of the region. Compared to more urbanized parts of the nation, is Middle Georgia's abundance of land and natural resources. Many people like short trips to more natural areas for hiking and biking or to experience the local culture of small towns. As Middle Georgia has these assets, the challenge which follows is to adequately conserve, support, enhance, and market these opportunities.

One of the greatest opportunities is becoming home to Georgia's first national park. The analysis of the Ocmulgee Mounds National Historical Park as a potential national park and preserve was completed in 2017 by the National Parks Conservation Association. This study, entitled *Diamond in the Rough*, projected that the creation of a new national park at Ocmulgee would generate over 1.1 million new visitors per year, generate over \$200 million in new economic activity annually, and support nearly 3,000 additional jobs. The National Park Service is currently in the final draft study phase of a Special Resource Study for the Ocmulgee River Corridor. When completed, the study could recommend that Congress designate the area as a national park. The study is expected to conclude within the next several months.

While this represents the asset with the largest growth potential, several more opportunities for new heritage tourism and eco-tourism exist across the region, with programs such as Georgia Grown and assets like the Museum of Aviation, Georgia National Fairground, the Hawkinsville Harness Racing Facility, and Rock Eagle. Middle Georgia is also home to state parks, national forests, and wildlife refuges. Actions to support these resources and further develop tourism could lead to significant economic gains.

Finally, every community has some sort of tourism or heritage asset. Stakeholders in this planning process noted a particular need to ensure that documentation of history and tourism are reflective of the region's diversity. Much like the Ocmulgee Mounds National Historical Park fulfills an important role in discussing the region's history before European explorers and settlers came to the area, so too does a need exist for documenting and sharing Black history in Middle Georgia. The Tubman Museum in downtown Macon-Bibb opportunity is an asset here, but other areas, like Jake's Woods in the Old Clinton area, also call out for preservation. This represents an opportunity to continue advancing economic prosperity within the region while keeping a keen focus on equity as the region charts a sustainable and thriving path forward.



Photo 20: Interior Secretary Deb Haaland visits the Earth Lodge at the Ocmulgee Mounds National Historical Park during the 30th Anniversary of the Ocmulgee Indigenous Celebration on September 17, 2022. (Photo Credit: U.S. Department of the Interior)

Baldwin County Activities

Baldwin County and Milledgeville have identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include but are not limited to Baldwin County, the City of Milledgeville, Development Authority of Milledgeville-Baldwin County, Milledgeville-Baldwin County Chamber of Commerce, Milledgeville-Baldwin County Convention and Visitors Bureau, Milledgeville Main Street/Downtown Development Authority, Central State Hospital Local Redevelopment Authority, Sinclair Water Authority, Fall Line Regional Development Authority, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Develop and enhance Fall Line Industrial Park with Wilkinson County.
- » Undertake buildout of the Sibley-Smith Megasite.
- » Continue enhancement of the Milledgeville-Baldwin County Industrial Park and consider a Spec Building on Daniels Site.
- » Develop and construct a convention/conference center.
- » Redevelop Central State Hospital property.
- » Develop a countywide vision and marketing strategy through the Carl Vinson Institute of Government's PROPEL Program.

City of Milledgeville Projects:

- » Continue downtown improvement through Main Street/ DDA program.
- » Development of a downtown hotel.
- » Continue work with Georgia Power CREATE (Cultivating Rural Entrepreneurs and Transforming Economics) Program to create a strategic and implementation plan for the local entrepreneur/small businesses.

Crawford County Activities

Crawford County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include but are not limited to Crawford County, the City of Roberta, the Development Authority of Crawford County, Roberta-Crawford County Chamber of Commerce, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Expand industrial land inventory and explore the development of a second industrial park.
- » Construct a new spec building to attract industries.
- » Maintain small business incubator and support new business development.
- » Establish a downtown development authority and/or Main Street program.
- » Undertake renovations of Old Courthouse and Historic Knoxville to promote tourism.
- » Partner with the Flint River Water Trail and expand access to and use of the Flint River for recreational and tourism purposes.

Houston County Activities

Houston County and each of its cities collaboratively identified several unique projects to undertake within the county and respective cities. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include but are not limited to Houston County, the City of Centerville, the City of Perry, the City of Warner Robins, Robins Air Force Base, Georgia VECTR Center, Houston County Development Authority, Warner Robins Development Authority, Robins Regional Chamber of Commerce, Warner Robins Convention and Visitors Bureau, Warner Robins Redevelopment Agency, Perry Area Chamber of Commerce, Perry Convention and Visitors Bureau, Perry Main Street, Perry Downtown Development Authority, Perry-Houston County Airport Authority, Houston County Hospital Authority, I-75 Corridor Council, Joint Development Authority of Peach County and the City of Warner Robins, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Continue the development of publicly owned industrial sites.
- » Support economic development efforts to diversify the local economy.
- » Support and coordinate efforts to identify, purchase, and develop future industrial sites.
- » Expand public transportation opportunities countywide.
- » Continue widening Hwy 96 to Interstate 16.
- » Support development and marketing of I-75 Corridor.
- » Develop an Innovation Center to support the Middle Georgia Innovation Project and Middle Georgia Innovation Corridor.
- » Explore opportunities to support the growing missions at RAFB, such as Project Synergy.

City of Centerville Projects:

- » Develop Center Park and develop and market Town Center.
- » Implement a downtown overlay to guide private development activities within the Town Center and to avoid incompatible uses.
- » Continue participation in the GICH (Georgia Initiative for Community Housing) program as a certified alumni community.
- » Work with Houston County Development Authority to enhance and expand industrial inventory.

City of Perry Projects:

- » Develop and market smaller commercial buildings (~10,000 sf).
- » Enhance downtown as a viable commercial center with additional public infrastructure.
- » Enhance downtown with quality infill development and redevelopment projects.
- » Ensure adequate water, sewer, and natural gas capacity for customers.
- » Expand wastewater and natural gas infrastructure for the airport and surrounding properties.
- » Enhance Perry-Houston County Airport and support its continued growth.
- » Market the city's State Opportunity Zone.
- » Work with Houston County Development Authority to enhance and expand industrial inventory.
- » Continue recruitment for retail and commercial projects.

City of Warner Robins Projects:

- » Construct the Warner Robins Welcome Center.
- » Implement a Commercial Circle Redevelopment strategy with a mixed-use approach.
- » Market and enhance The Village at Town Center.
- » Increase workforce and affordable housing to support the needs of both RAFB and the broader community.
- » Expand water and sewer capacities.
- » Enhance community entrances and gateways through beautification efforts.
- » Partner with VECTR Center to support mixed-use development in the surrounding area.
- » Increase capital for business growth among small and medium business enterprises, as well as women-owned, minority-owned, and veteran-owned businesses.
- » Work with Houston County to develop encroachment property on the north end of RAFB for industrial use.
- » Coordinate with RAFB and DoD to develop city-owned land on the north end of RAFB.
- » Support industrial opportunities with the Joint Development Authority in Peach County including support of Robins International Industrial Park.

Jones County Activities

Jones County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include but are not limited to Jones County, the City of Gray, Jones County Development Authority, Main Street Gray, Downtown Development Authority of Gray, Gray-Jones County Chamber of Commerce, Old Clinton Historical Society, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Complete improvements to Griswoldville Industrial Park, including rail spur and sewer.
- » Secure GRAD certification of Griswoldville Park.
- » Increase industrial site advertising.
- » Continue improvements in the downtown business corridor.

Macon-Bibb County Activities

Macon-Bibb County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include but are not limited to Macon-Bibb County, Macon-Bibb County Planning and Zoning Commission, Macon-Bibb County Industrial Authority, Greater Macon Chamber of Commerce, Macon-Bibb County Urban Development Authority, NewTown Macon, Macon-Bibb Community Enhancement Authority, Macon Arts Alliance, Main Street Macon, Macon-Bibb County Convention and Visitors Bureau, Macon Water Authority, Ocmulgee Mounds National Historical Park, Historic Macon Foundation, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Implement a comprehensive workforce development program.
- » Continue development of the South Macon-Bibb industrial district.
- » Make improvements at Middle Georgia Regional Airport.
- » Redevelop brownfield sites in the downtown industrial district.
- » Actively promote and market key industrial sites throughout the county.
- » Undertake redevelopment of Macon Mall property, including a new amphitheater.
- » Enhance redevelopment of Second Street Corridor.
- » Redevelop the Ocmulgee Crossings TAD area.
- » Transportation improvements in Ocmulgee East Industrial Park.
- » Support efforts of the I-75 Central Corridor Coalition to improve accessibility and smart growth planning from Macon-Bibb County to Henry County.

Monroe County Activities

Monroe County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to Monroe County, the City of Culloden, the City of Forsyth, Development Authority of Monroe County, Forsyth-Monroe Chamber of Commerce, Forsyth Convention and Visitors Bureau, Forsyth Main Street, Downtown Development Authority of Forsyth, Georgia Public Safety Training Center, State Offices South at Tift College, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Target light manufacturing and high-tech industries to locate in Monroe County
- » Pursue public safety businesses and industries to complement existing employers
- » Ensure adequate utility infrastructure, water, and sewer for potential industries
- » Market Meridian 75 Logistics Center
- » Support entrepreneurial business opportunities
- » Improve the electrical capacity of Monroe County Industrial Park
- » Support the education system in its initiatives to increase the skilled workforce and create a College and Career Academy
- » Support efforts of the I-75 Central Corridor Coalition to improve accessibility and smart growth planning from Macon-Bibb County to Henry County

Peach County Activities

Peach County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to Peach County, the City of Byron, the City of Fort Valley, Development Authority of Peach County, Peach Regional Chamber of Commerce, Byron Convention and Visitors Bureau, Byron Main Street, Byron Downtown Development Authority, Byron Development Authority, Fort Valley Main Street, Fort Valley Downtown Development Authority, I-75 Corridor Council, Joint Development Authority of Peach County and the City of Warner Robins, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Support industrial opportunities with the Joint Development Authority in Warner Robins, including support of Robins International Industrial Park and marketing of the park's GRAD certification.
- » Market the Middle Georgia Megasite and enhance its value with infrastructure improvements to increase water and sewer capacity.
- » Promote the newly acquired Highway 49 Tech Park.
- » Actively pursue recruitment of professional, managerial, and high-tech jobs.

City of Byron Projects:

- » Undertake water infrastructure improvements to increase capacity at the Benjamin Hawkins Industrial Park.
- » Implement proposed Main Street and Moseley Road improvements to add parking spaces downtown and facilitate the movement of visitors and pedestrians.
- » Address needed stormwater improvements throughout the city, especially downtown.
- » Address substandard housing concentrations

City of Fort Valley Projects:

- » Improve lodging options and recruit a conference center to Fort Valley.
- » Revitalize downtown areas and capitalize on public parks and plazas
- » Address substandard housing concentrations

Pulaski County Activities

Pulaski County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to: Pulaski County, the City of Hawkinsville, Pulaski County-Hawkinsville Development Authority, Hawkinsville-Pulaski County Chamber of Commerce, Hawkinsville Downtown Development Authority, Hawkinsville Main Street, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Focus on retention of young adults in the community.
- » Work to build a strong relationship with the education system and activate youth leadership initiatives.
- » Continue to implement the community's coordinated marketing/branding campaign.
- » Revitalize downtown Hawkinsville and clean up abandoned sites and brownfields.
- » Develop a plan of action to create tourism and recreation attractions for the City of Hawkinsville.
- » Complete a long-term economic development plan through PROPEL initiative.
- » Attract micro-industry to Hawkinsville.
- » Expand and improve Hawkinsville-Pulaski County Airport.

Putnam County Activities

Putnam County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to Putnam County, the City of Eatonton, Putnam Development Authority, Eatonton Downtown Development Authority, Eatonton Main Street, Eatonton-Putnam Chamber of Commerce, Eatonton-Putnam Water and Sewer Authority, Sinclair Water Authority, Lake Oconee Area Development Authority, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Obtain GRAD certification of the 121-acre site in South Industrial Park.
- » Implement CIDs, BIDs, or TADs to aid development efforts.
- » Develop an arts and heritage tourism program.
- » Promote a support network for retirees.
- » Increase the presence of the retail industry.
- » Support construction and homebuilding industry in Putnam County.
- » Continue development of the Eatonton City Center Stage in downtown to attract new tourism and entertainment opportunities.

Twiggs County Activities

Twiggs County has identified several unique projects to undertake within the county. The community also seeks to accomplish and support the regional goals and projects that have the potential to positively benefit the county. Key implementing and supporting actors include, but are not limited to Twiggs County, the City of Danville, the City of Jeffersonville, Development Authority of the City of Jeffersonville and Twiggs County, Downtown Development Authority of the City of Jeffersonville, Twiggs County Chamber of Commerce, Central Georgia Joint Development Authority, and Middle Georgia Regional Commission.

Countywide Projects:

- » Further develop publicly owned industrial parks and sites, especially the 257-acre tract located on Hill and Dale Road.
- » Acquire additional industrial property.
- » Continue improvements to Jeffersonville and Twiggs County water and sewer systems.
- » Pursue quality of life enhancements, especially related to housing, healthcare, and retail.
- » Expand health care and education space for the Community Health Care Systems facility located on Watson Road and owned by the Development Authority of the City of Jeffersonville and Twiggs County.
- » Support downtown development and revitalization in Jeffersonville, including a focus on attracting mixed-use development.
- » Further workforce development activities in collaboration with the board of education.
- » Support business recruitment and retention.

Work on EDA Investment Priorities in Middle Georgia

The following section describes specific activities of the region and its local stakeholders that are currently being undertaken to fulfill the EDA investment priorities. Certainly, these are not the only projects but represent a sampling of focus areas. Some of these topics are required elements of the CEDS while others are not. In any case, however, their inclusion should help determine the future alignment of projects with both this document and the priorities of EDA.

Equity

In Middle Georgia, like in all regions, some communities are far more economically prosperous than others. This section includes maps below and on the following pages that highlight areas that experience higher rates of distress and underinvestment.

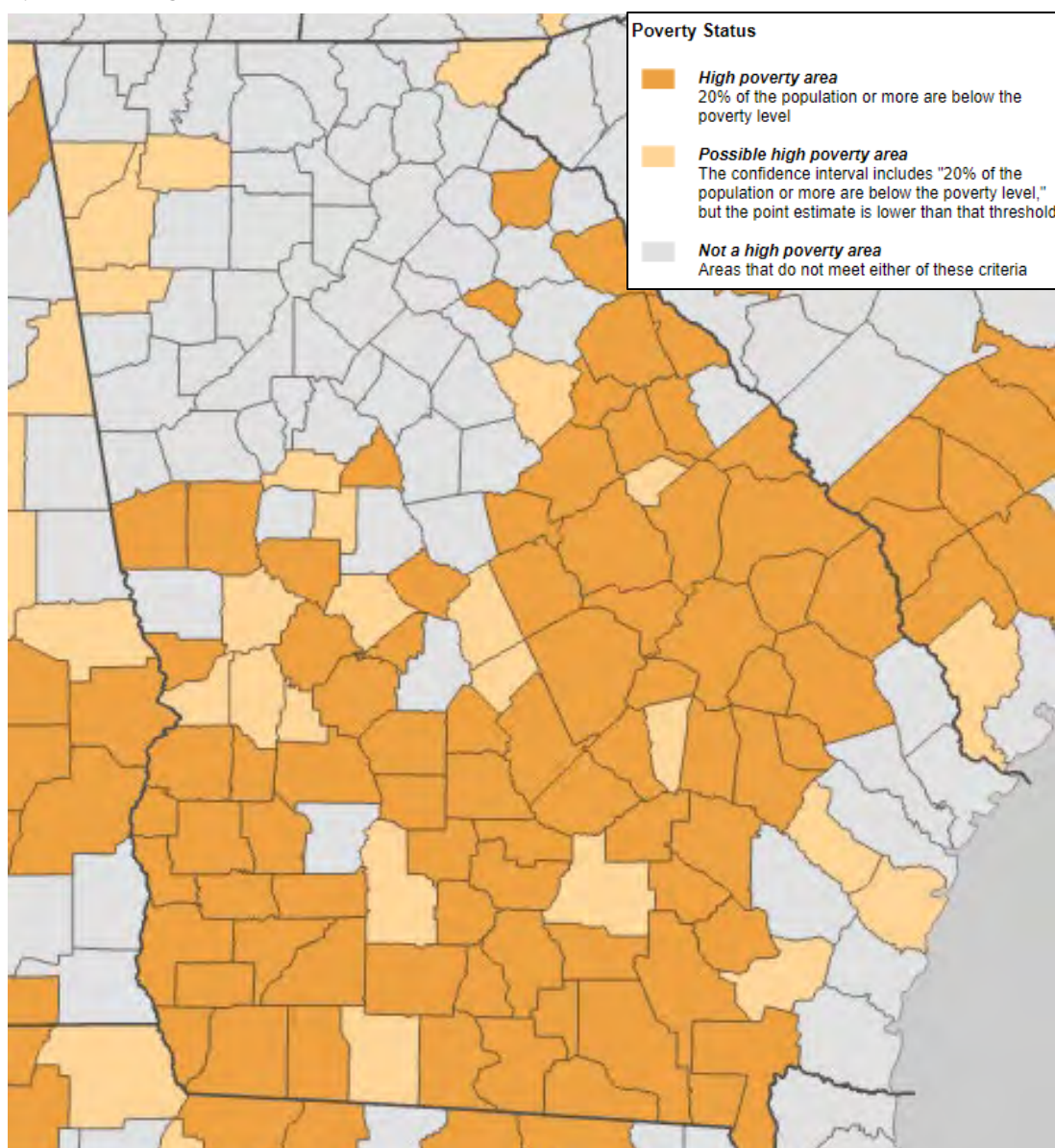


Photo 22: Map of high poverty counties in Georgia (EDA Census Poverty Status Viewer)

In many cases, rural communities have experienced underinvestment compared to more urban areas. In the map below, Crawford County, Peach County, Pulaski County, Twiggs County, and Wilkinson County all represent predominately rural areas that experience high rates of poverty. Rural poverty is also found in pockets of Baldwin County, Jones County, Monroe County, and Putnam County.

With that said, some of the densest urban areas also suffer from high rates of poverty and distress. Many of these communities are minority-majority areas that have long seen a lack of investment due to systemic factors such as redlining that have contributed to persistent poverty. This can be seen in the urban clusters of Fort Valley and Milledgeville, as well as in large parts of Warner Robins and Macon-Bibb County. Within Warner Robins, this primarily focuses on neighborhoods around one mile north or south of Watson Boulevard. Areas closer to Robins Air Force Base are also more likely to be distressed—typically following areas where older neighborhoods exist in the city. Within Macon-Bibb County, most of the former city limits are considered impoverished, excluding the Vineville and Ingleside neighborhoods. In more outlying parts of Macon-Bibb County, the East Macon and Sub-South areas are most likely to experience poverty.

Looking at economic development with a focus on equity would result in actions that specifically prioritize investment and new job creation in the communities that are in greatest need. Indeed, EDA investment criteria allow greater levels of federal funding in distressed communities. Likewise, the State of Georgia's job tax credits incentivizes job creation in poor communities. Federal programs like Opportunity Zones also are targeted toward impoverished areas. Localities qualify as Federal Opportunity Zones if they have been nominated for that designation by the state and that nomination has been certified by the Secretary of the U.S. Treasury. Designated Federal Opportunity Zones may not be added or altered. County maps of the Federal Opportunity Zones in Middle Georgia can be seen on the pages below.

The Baldwin County OZ includes the full Central State Hospital campus, which has several key redevelopment sites available. The former Rheem Manufacturing facility on US-441 also sits vacant within the OZ. The Baldwin County OZ stretches beyond many areas in and around Milledgeville with concentrated poverty. Significant rural areas, including lakefront properties and the Baldwin County Airport, are also included.

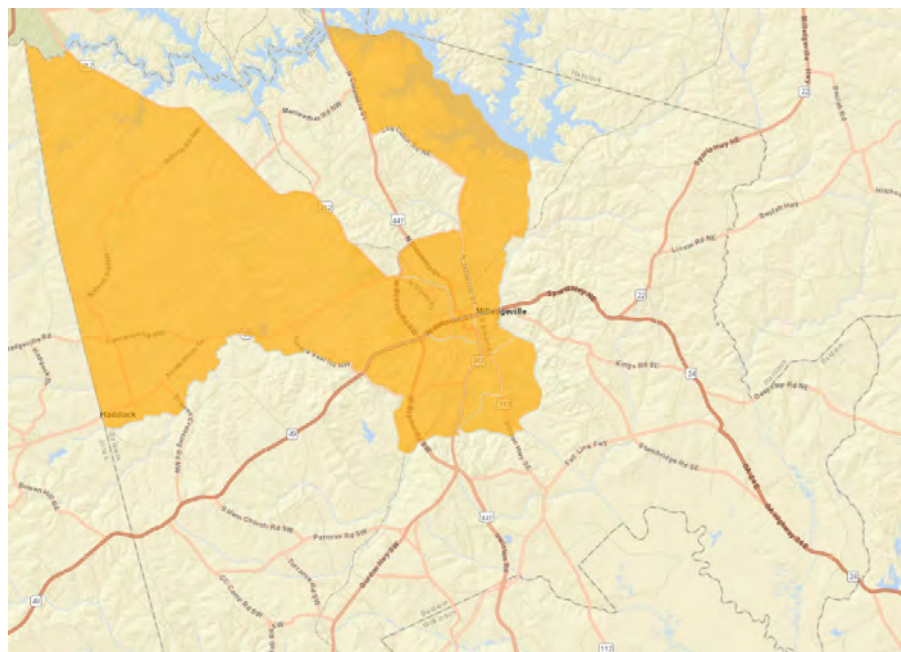


Photo 23: Baldwin County Federal OZ

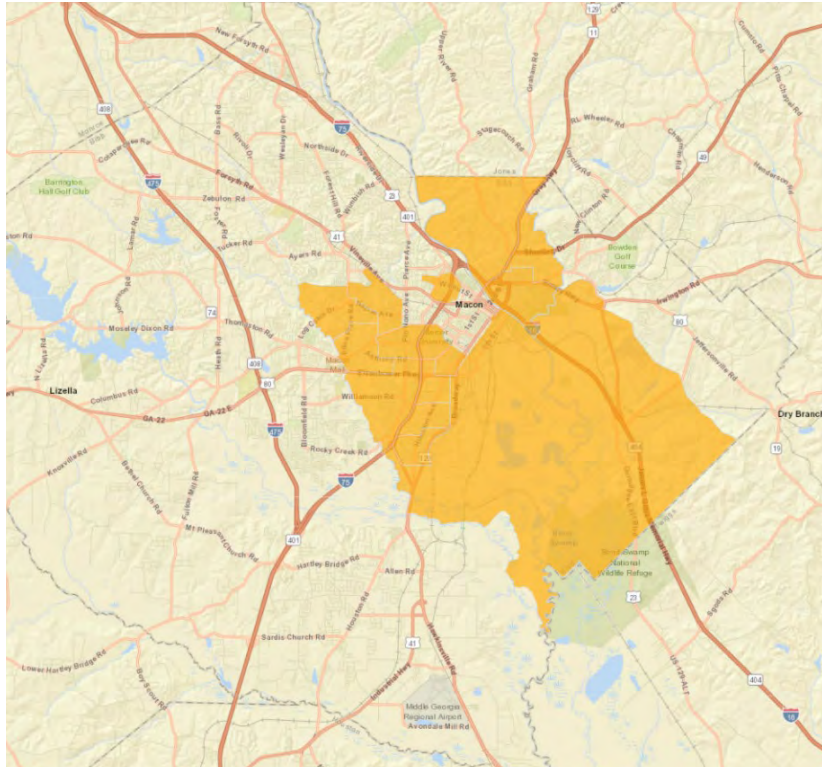


Photo 24: Macon-Bibb County Federal OZ

The Macon-Bibb County OZ contains much of the area designated in the city’s Urban Redevelopment Plan. As such, this document should be referenced for development within the OZs. Notable areas that are contained in both the Macon-Bibb URP and OZ include the neighborhoods of Pleasant Hill, Unionville, Payne City, South Macon, Baconsfield, Lynmore Estates, and East Macon. The OZ also contains a large census tract along I-16 and the Ocmulgee River. While much of this land is undevelopable, the area also includes the former Brown and Williamson site, and the Ocmulgee East Industrial Park.

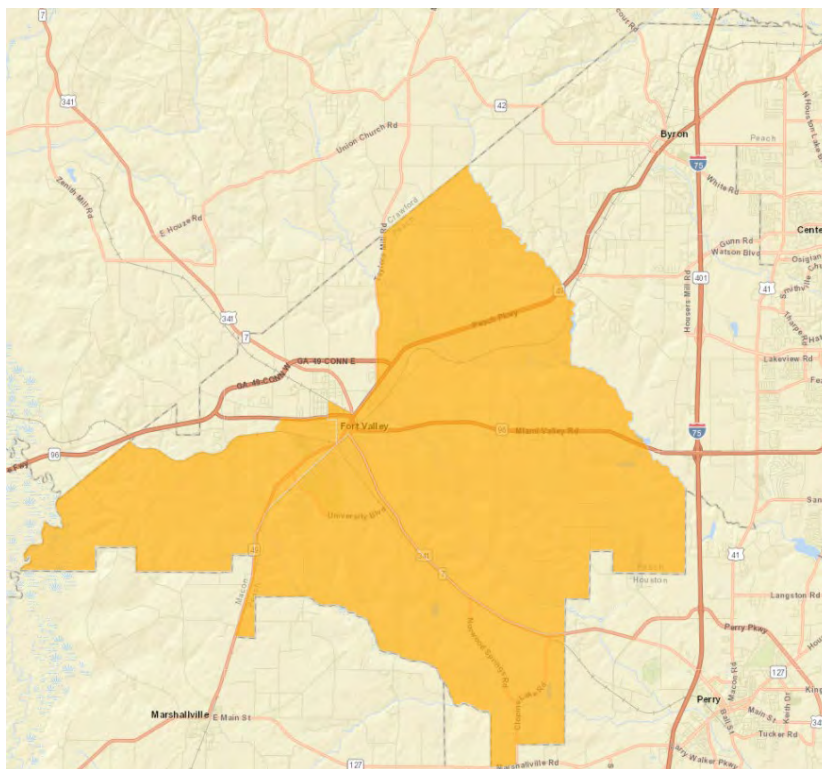


Photo 25: Peach County Federal OZ

The Peach County OZ contains most of the county south of Mule Creek and Mossy Creek. The only areas not included are the northwest quadrant of Fort Valley and the Fall Line Freeway area west of Fort Valley. This OZ contains Fort Valley State University and surrounding neighborhoods along Spruce Street, State University Drive, and College Street. The entirety of the Fort Valley Downtown Historic District is also included within the OZ. In addition, the OZ includes the South Peach Industrial Park and Middle Georgia Megasite, providing potential for new investment in advanced manufacturing and logistics, among other key sectors.

For investors looking for development opportunities in the Middle Georgia Federal Opportunity Zones, the following individuals are the recommended points of contact:

Baldwin County (City of Milledgeville) Federal Opportunity Zone: Jonathan Jackson
Development Authority of the City of Milledgeville and Baldwin County
 105 East Hancock Street | Milledgeville, GA 31061
 (478) 451-0369 | jjackson@developmilledgeville.com

Macon-Bibb County Federal Opportunity Zone: Alex Morrison
Macon-Bibb County Urban Development Authority
 200 Cherry St, STE 100 | Macon, GA 31201
 (478) 803-2402 | AMorrison@maconbibb.us

Peach County (City of Fort Valley) Federal Opportunity Zone: B.J. Walker
Development Authority of Peach County
 425 James E. Khoury Drive, Unit B | Fort Valley, GA 31030
 (478) 825-3826 | peachcountydevelopment@ymail.com

Finally, the region also has a significant opportunity for investments that will promote equity in the region through the newly empowered Southeast Crescent Regional Commission. Much like the Appalachian Regional Commission has provided investments throughout northern Georgia for many years, the Southeast Crescent Regional Commission would be able to bridge gaps in equity by targeting investment through parts of Middle Georgia. This opportunity is one that the region will be watching closely in the years ahead.

Southeast Crescent Regional Commission

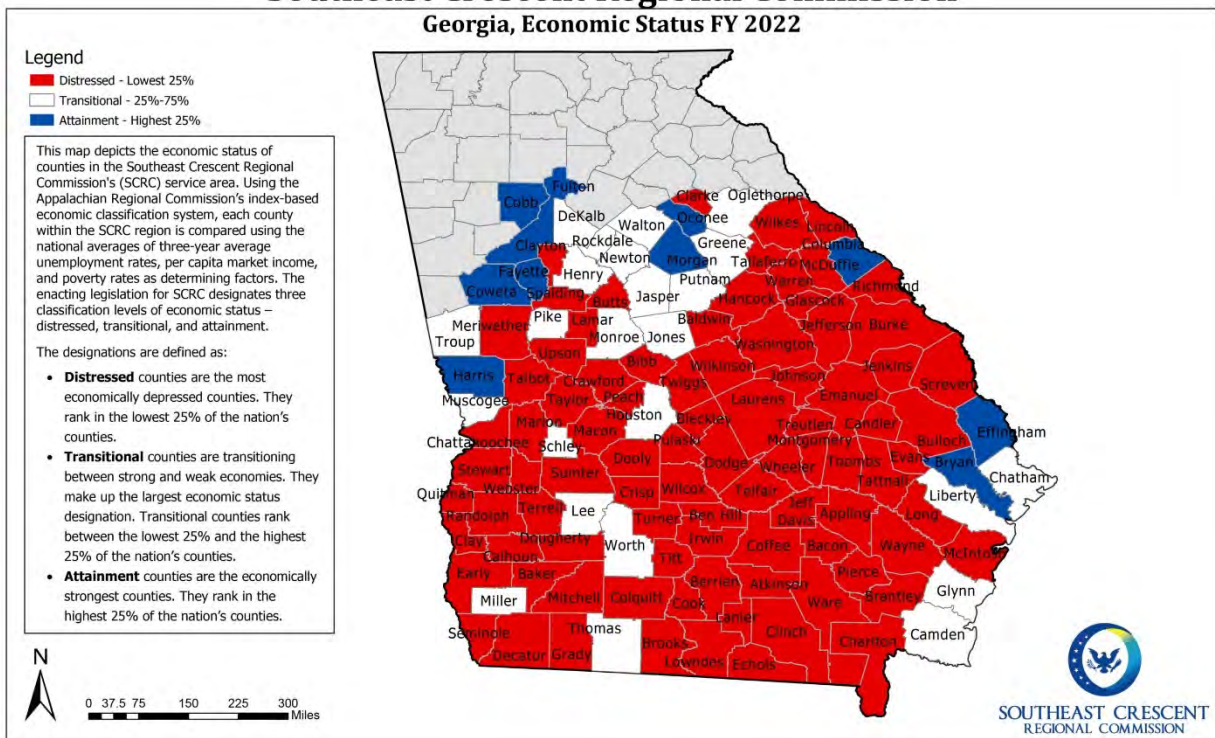


Photo 26: Georgia Counties in the Southeast Crescent Regional Commission

Recovery and Resilience

Resilience is a specific component required in the CEDS by the U.S. Economic Development Administration. As they have noted in the past, “regional economic prosperity is linked to an area’s ability to prevent, withstand, and quickly recover from major disruptions to its economic base.” This has been discussed in more detail through the region’s COVID-19 Recovery and Resilience Plan, which is a companion document to this one in some ways. However, stakeholders have also noted the importance of a diverse regional economy that can withstand major shocks.

The largest type of shock would clearly be Base Realignment and Closure (BRAC). A BRAC process has the potential to significantly damage a community but can also stress the local labor force and supply chains if significant new missions are added. Robins Air Force Base is by far the region’s largest employer and is the largest single-site industrial complex in the entire state. Based on 2020 data and using an employment multiplier developed by Mercer University with the Middle Georgia Regional Commission, an additional 1.44 jobs are impacted in the region for each job lost or gained at Robins Air Force Base. In total, this accounts for a significant portion of employment and economic activity in the region. To mitigate the possible adverse effects of a BRAC, Middle Georgia is committed to implementing recommendations from the Middle Georgia-Robins Air Force Base Sustainability Plan. These action items are intended to ensure that the community is well-positioned to sustain the mission readiness of the installation and to ensure that the base does not adversely impact the community.

The defense industry presents the greatest need for diversification at the regional level, although smaller communities also need new jobs and opportunities to help diversify their economies. This is particularly beneficial when the new jobs created are in externally traded sectors, such as manufacturing, instead of local service sectors. Aside from manufacturing and logistics, the film and tourism industries present opportunities for rural communities to capitalize on their rustic charm.



Photo 27: Participants in the 2022 Regional Leadership Champions program learning about collaborative decision making in a regional environment. The MGRLC program is an MGRC program that seeks to train leaders to support one another in cooperation on difficult and multi-jurisdictional challenges.

Finally, regional cooperation should be a continuing priority to address the challenges associated with major economic disruptions. Commuting patterns generally do not abide by the boundaries of counties and cities, and residents frequently engage in some variety of economic activity in a location other than their place of residence, be that commuting to work, purchasing goods, or obtaining services. For this reason, there exists a mutual benefit to cooperation with the end goal of securing regional wins rather than fighting against the efforts of neighboring communities. The Middle Georgia Regional Commission will continue to be an advocate and partner in this effort.

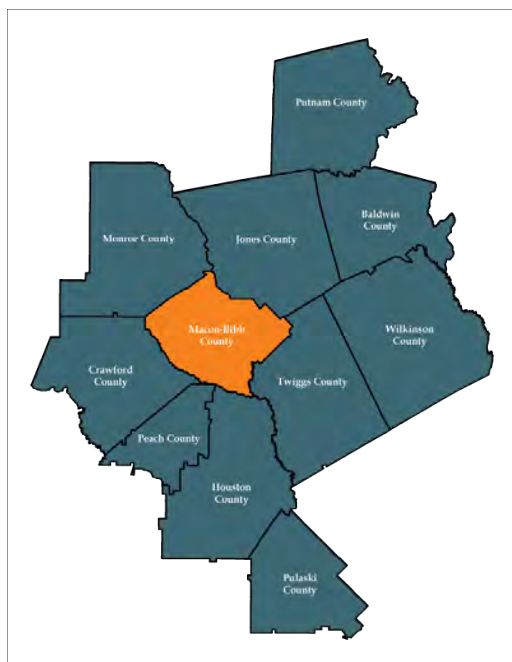


Photo 28: The two local workforce development areas in Region 6 include Macon-Bibb County (Area 10, served by MGRC) and the surrounding Middle Georgia counties (Area 11, served by the Consortium).

Workforce Development

The Middle Georgia Regional Commission and Middle Georgia Consortium work together to administer programs under the Workforce Innovation and Opportunity Act (WIOA). These programs continue to focus on developing skillsets for prospective employees to meet the needs of regional employers while providing good jobs and gainful employment opportunities. These two entities prepare a Region 6 Workforce Plan that highlights strategies for workforce development. This plan is adopted by reference to discuss these strategies in more detail. Broadly, these strategies call on the Region 6 service providers to coordinate and align resources through regular employer outreach to ensure that employee recruitment services, work-based learning programs, and rapid response services can all be catered to meet community needs.

Manufacturing

Although the manufacturing sector has not particularly seen notable job growth within Middle Georgia, it remains an important part of the economic development strategy. Advanced manufacturing employers are particularly important for providing skilled workers with wages that can support working-class families. As part of the High Demand Career Initiative (HDCI) in the State of Georgia, Middle Georgia focused specifically on the development of the workforce to support advanced manufacturing technologies. Recent company locations to the region such as Irving Consumer Products and Jack Link's are among the manufacturers that have recently chosen to call Middle Georgia home due to its strategic location and favorable business conditions. With that said, employment in the manufacturing sector is currently at its lowest employment in the last 20 years. This is despite overall employment growth. As such, attempting to recruit more manufacturing jobs will be key to ensuring that growth results in meaningful economic prosperity for the citizens of the region.

Technology-Based Economic Development

The State of Georgia, including Middle Georgia in particular, has been fortunate to be selected as a winner of an EDA Build Back Better Regional Challenge grant. As discussed earlier in the regional projects area of this document, substantial work will be undertaken in recent years that aligns with the investment priority for technology-based economic development. As the region transitions to Industry 4.0 technologies, significant new opportunities will be available. Beyond the artificial intelligence applications in the aerospace, defense, and advanced manufacturing industries that are expected, the region also has the potential to explore precision-based agriculture and other technological improvements that will reshape the economies of both urban and rural communities alike. Middle Georgia remains committed to the integration of technology into new growth and development with a focus on ensuring all regions can participate in these new jobs.

Environmentally Sustainable Development

As discussed earlier in the regional projects section of the plan, environmental sustainability is a key priority for the region as it ties to economic development. As noted, Middle Georgia seeks to specifically capitalize on growth in the manufacturing of green products. However, the region also shares a broader commitment to green buildings and sustainable practices. The Middle Georgia Clean Air Coalition is a specific partner in these efforts and shares staff capacity with the Middle Georgia Regional Commission. Current goals for the Middle Georgia Clean Air Coalition include the following:

- » Goal #1: Improve Readiness for Electric Vehicle Transitions
- » Goal #2: Expand Middle Georgia Solar Programs
- » Goal #3: Undertake Projects for Green, Efficient, and Healthy Buildings
- » Goal #4: Support Transit and Smart Growth Planning to Improve Air Quality

Regarding goals for smart growth planning, the Middle Georgia Clean Air Coalition is also joined by the I-75 Central Corridor Coalition. Their work has been mentioned elsewhere throughout this plan but is also important as a working group for sustainable development practices that improve the livability and sustainability of the I-75 corridor from Atlanta to Middle Georgia.

Exports and Foreign Direct Investment (FDI)

Middle Georgia has seen tremendous growth in the warehousing and transportation sectors of the economy. On-the-ground evidence shows a boom in new warehouse space that supports growth in the state's importing and exporting economy—particularly given Middle Georgia's proximity to the Port of Savannah. Proposed investments in an intermodal facility for the region would be key to continuing to stimulate exports from the region. Regarding FDI, Middle Georgia has established partnerships with many foreign companies such as Zschimmer and Schwarz, Kumho Tire, Irving Consumer Products, and Sandler AG Nonwovens. The region is also able to take advantage of its location within the Georgia Foreign Trade Zone (FTZ #26). All of Crawford County, Jones County, Macon-Bibb County, Monroe County, and Putnam County are eligible to benefit from this designation, as are portions of Houston County, Peach County, and Twiggs County. In the past, Middle Georgia had designated acreage within this FTZ. While that is no longer specifically the case, the benefits are still active within the region.



Photo 29: Service area of FTZ #26, which covers the City of Atlanta, centered on Hartsfield-Jackson Atlanta International Airport, and includes much of northern and northwest Georgia.

Evaluation Framework

The final required component of the CEDS is a discussion of how to evaluate the success of economic development efforts undertaken throughout the region. A variety of proposed measures of success are described below—some of which are concrete statistical measures and others of which are more abstract measures of capacity.

Quantitative Measures of Outcomes

The first and most obvious statistical measurements are the short-term numbers of jobs created or retained and private investment in the community. Frequently, positive trends of new investment and new jobs are indicators of a growing regional economy and successful economic development efforts. These statistics can be viewed on an annual basis and can most effectively illustrate the small wins of economic development.

In the longer run, the combination of repetitive small wins can show a broader collective impact on some of the key statistical trends noted earlier in the background section of the CEDS. While data may be difficult to discern from one year to the next, over the five-year planning life of this CEDS, the region can look to see improvement in these areas. Specifically, a reduction in poverty, lower rates of unemployment, and greater levels of educational attainment will highlight an increase in regional economic prosperity. If Middle Georgia's efforts are successful, the region should see a more diverse base of employment with higher average wages, and the region should rate better regarding regional innovation.

Qualitative Measures of Capacity

While the above statistical measures are beneficial in providing hard data, that perspective does not always reflect success in its entirety. Communities can sometimes get lucky with prospects despite poor planning, but in other instances, the best-laid plans can fall through due to circumstances beyond their control. For this reason, it is also helpful to measure capacity for future growth as an indicator of successful efforts in the field of economic development. Most significantly, this includes an analysis of the resources available for future growth, such as available industrial sites or buildings, especially those that have the Georgia Ready for Accelerated Development (GRAD) designation. Industrial parks throughout the region lack the infrastructure to support immediate development, but companies may be ready to move quickly once their ideal location is found. The addition of a rail spur or road, utility services, and completed environmental studies are real successes for many Middle Georgia communities, especially in rural parts of the region. Business support services are another measure of success.

Beyond this is the willingness, by either public or private entities, to invest locally in capacity building for economic growth. The ability to take these actions varies greatly from one community to the next, but the commitment of a local match is a precursor to nearly all large-scale economic development projects. The extent to which grants are awarded within Middle Georgia, including the leveraging of local funds, is another prime indicator of success. This is not to say that spending money itself is a success, but if properly directed as part of a well-developed strategy with local support, it can be an extremely beneficial and even necessary precursor to future growth.

A Final Word on Evaluation

The preceding measures can all be helpful tools to determine if the investment of EDA is having a positive impact on Middle Georgia. As ever, those in Middle Georgia continue to expect positive change because of the careful investment decisions made by EDA. However, just as one should make no small plans, the path forward for Middle Georgia looks to boldly shape the regional economy to be conducive to long-term prosperity. Five years ago, this plan concluded by noting, *“The strongest case for progress that can be proved is if the statistical measures begin to close their gaps in performance between Middle Georgia and other regions of the country in the years ahead.”*

Looking at where Middle Georgia is situated today, the past five years can be evaluated as a success for Middle Georgia, even despite the enormous global challenges that have been felt throughout every corner of the region. In comparison to other counties and regions across the nation, Middle Georgia is less impoverished and more fully employed than five years ago. The region is better educated than in 2017, and entrepreneurship has grown throughout the region. The region is more innovative than it was five years ago, and Middle Georgia has thrived in comparison to the rest of the country. This does not mean that all gaps are closed. The region continues to see higher rates of economic distress in many areas, and improvements in economic well-being have lagged behind the growth of employment. However, this remains a positive sign for the future direction of Middle Georgia. Further, it clearly illuminates that through continued targeted investment, we can become a region that succeeds at living, innovating, and thriving!



Photo 30: A Middle Georgia sunset at Bass Road in Macon.

Appendix A: Plan Adoption Resolution

**RESOLUTION TO SUBMIT THE
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
TO THE ECONOMIC DEVELOPMENT ADMINISTRATION**

WHEREAS, the Middle Georgia Regional Commission (MGRC) has been a designated Economic Development District under the requirements and regulations of the Department of Commerce, Economic Development Administration (EDA) since 1978; and

WHEREAS, the member governments and citizens of the Middle Georgia Regional Commission have benefited through the resources and assistance available to designated districts and numerous successful projects throughout the district; and

WHEREAS, the EDA requires qualifying districts to prepare a Comprehensive Economic Development Strategy (CEDS) to guide the region's economic development programs and to remain eligible for EDA assistance and financial awards; and

WHEREAS, the EDA requires a five-year plan for economic development to be included in the CEDS; and

WHEREAS, a draft CEDS document has been prepared and made available for public review with any public comments to be addressed prior to submission to EDA; and

WHEREAS, an Economic Recovery and Resilience Plan in Response to COVID-19 has also been prepared for submission to EDA as a companion document; and

WHEREAS, the Council desires that the CEDS document be submitted to EDA in fulfillment of the requirements; and the Council has determined that the current CEDS update reasonably reflects goals, projects, and desired outcomes.

NOW, THEREFORE, BE IT RESOLVED that the Council of the Middle Georgia Regional Commission does hereby adopt the 2022 - 2027 Comprehensive Economic Development Strategy Update as the general guide for economic development activities and approves the Comprehensive Economic Development Strategy for submission to the Economic Development Administration in compliance with the requirements.

NOW, THEREFORE, BE IT FURTHER RESOLVED that the Council of the Middle Georgia Regional Commission does hereby adopt the Economic Recovery and Resilience Plan in Response to COVID-19 as a companion document to the CEDS for submission to the Economic Development Administration.

Certificate of Passage

I hereby certify that the above and foregoing resolution was duly adopted by the Middle Georgia Regional Commission in a regular session assembled on the 8th day of September 2022 and recorded in the official minutes of the Middle Georgia Regional Commission.

ATTEST:


Laura M. Mathis, Executive Director


John R. Harley, Chairman

Appendix B: Data Tables

Table 1 -- Projected Population Change (2010 - 2050)

County	2010	2020	2025	2030	2040	2050	Avg Annual Prct Change
Baldwin	45,700	43,799	44,080	44,320	44,280	43,880	-0.10%
Crawford	12,590	12,130	12,220	12,320	12,500	12,680	0.02%
Houston	140,650	163,633	174,430	183,840	201,880	219,850	1.41%
Jones	28,650	28,347	29,300	30,380	32,280	34,010	0.47%
Macon-Bibb	155,810	157,346	157,370	157,650	156,380	153,840	-0.03%
Monroe	26,180	27,957	29,810	31,130	33,580	35,910	0.93%
Peach	27,860	27,981	29,060	29,790	30,940	31,870	0.36%
Pulaski	11,970	9,855	10,070	10,270	10,670	11,090	-0.18%
Putnam	21,190	22,047	23,150	23,870	25,390	27,000	0.69%
Twiggs	8,970	8,022	7,850	7,830	7,810	7,790	-0.33%
Wilkinson	9,530	8,877	8,800	8,760	8,670	8,590	-0.25%
Region	489,100	509,994	526,140	540,160	564,380	586,510	0.50%
Georgia	9,711,880	10,711,908	11,234,710	11,780,940	12,860,570	13,980,820	1.10%
United States	309,321,600	331,449,281	340,970,910	352,070,270	372,916,420	393,774,710	0.68%

Source: Woods & Poole Economics, 2022

Note: 2010-2020 data are historical (with 2020 being pulled from 2020 DEC Redistricting Data, PL 94-171), 2025-2050 are projections

Table 2 -- Projected Median Age (2010 - 2050)

County	2010	2020	2025	2030	2040	2050
Baldwin	33.03	35.80	35.16	34.65	37.47	37.73
Crawford	41.10	44.60	44.99	44.99	45.60	44.48
Houston	33.98	35.60	36.57	37.71	39.13	40.42
Jones	38.35	40.40	41.85	42.01	43.02	44.60
Macon-Bibb	35.06	36.30	36.30	37.43	39.29	39.21
Monroe	41.01	42.90	43.51	43.83	44.82	46.27
Peach	32.89	38.00	39.22	40.37	41.63	41.00
Pulaski	40.84	41.00	44.85	45.18	46.56	47.16
Putnam	43.12	47.80	47.60	47.60	48.00	46.98
Twiggs	44.74	47.20	47.50	47.38	46.57	44.14
Wilkinson	40.56	43.00	41.84	41.37	39.72	39.55
Georgia	34.90	36.90	37.15	37.76	38.60	39.41
United States	36.70	38.20	38.82	39.60	40.66	41.00

Source: Woods & Poole Economics, 2022

Note: 2010-2020 data are historical (with 2020 being pulled from U.S. Census Bureau 2016-2020 ACS 5 Year Estimates), 2025-2050 are projections

Table 3 -- Wages (non-adjusted) and Wage and Salary Employment by County (1970 - 2020)

County	Description	1970	1980	1990	2000	2010	2020	Avg Yearly Prct Chg
Baldwin	Wage & salary emp.	11,733	15,696	19,455	19,976	16,835	16,697	0.85%
	Avg. wages and salaries	\$ 4,869	\$ 10,942	\$ 17,750	\$ 24,130	\$ 31,064	\$ 37,336	13.34%
Crawford	Wage & salary emp.	1,133	1,144	1,240	1,644	1,435	1,520	0.68%
	Avg. wages and salaries	\$ 3,355	\$ 7,592	\$ 12,603	\$ 20,409	\$ 29,664	\$ 33,953	18.24%
Houston	Wage & salary emp.	38,594	37,018	44,838	52,181	64,686	68,469	1.55%
	Avg. wages and salaries	\$ 7,585	\$ 14,195	\$ 21,374	\$ 31,405	\$ 44,300	\$ 52,604	11.87%
Jones	Wage & salary emp.	2,110	2,140	2,872	3,602	3,977	4,535	2.30%
	Avg. wages and salaries	\$ 3,978	\$ 9,171	\$ 15,713	\$ 23,262	\$ 30,972	\$ 41,219	18.72%
Macon-Bibb	Wage & salary emp.	60,006	67,868	84,055	96,641	85,675	86,334	0.88%
	Avg. wages and salaries	\$ 5,481	\$ 11,907	\$ 21,035	\$ 29,721	\$ 38,149	\$ 49,341	16.00%
Monroe	Wage & salary emp.	4,164	6,750	6,031	5,539	6,735	8,117	1.90%
	Avg. wages and salaries	\$ 3,907	\$ 11,948	\$ 16,562	\$ 25,078	\$ 36,468	\$ 45,547	21.32%
Peach	Wage & salary emp.	4,887	6,728	7,848	9,075	8,405	10,277	2.21%
	Avg. wages and salaries	\$ 4,247	\$ 10,709	\$ 19,148	\$ 26,811	\$ 33,053	\$ 42,214	17.88%
Pulaski	Wage & salary emp.	2,775	2,521	2,801	3,499	3,126	3,250	0.34%
	Avg. wages and salaries	\$ 3,513	\$ 8,141	\$ 14,067	\$ 24,046	\$ 31,037	\$ 36,020	18.51%
Putnam	Wage & salary emp.	3,030	4,172	4,932	6,926	6,655	5,994	1.96%
	Avg. wages and salaries	\$ 4,003	\$ 11,243	\$ 17,531	\$ 25,465	\$ 30,026	\$ 38,692	17.33%
Twiggs	Wage & salary emp.	2,042	2,224	2,163	1,913	1,234	1,973	-0.07%
	Avg. wages and salaries	\$ 5,842	\$ 14,315	\$ 26,633	\$ 35,278	\$ 33,293	\$ 40,229	11.77%
Wilkinson	Wage & salary emp.	2,674	3,346	3,672	3,568	3,120	3,632	0.72%
	Avg. wages and salaries	\$ 5,424	\$ 13,342	\$ 24,350	\$ 32,658	\$ 43,290	\$ 44,622	14.45%
Regional	Wage & salary emp.	133,148	149,607	179,907	204,564	201,883	210,798	1.17%
	Avg. wage per job	\$ 5,830	\$ 12,233	\$ 20,319	\$ 29,023	\$ 38,762	\$ 47,996	14.46%
Georgia	Wage & salary emp.	1,849,605	2,377,591	3,182,256	4,132,965	4,032,763	4,609,427	2.98%
	Avg. wage per job	\$ 5,890	\$ 12,497	\$ 21,900	\$ 34,316	\$ 44,924	\$ 59,735	18.28%
United States	Wage & salary emp.	78,793,000	97,646,000	116,544,000	137,610,000	135,526,000	147,236,000	1.74%
	Avg. wage per job	\$ 6,922	\$ 13,999	\$ 23,423	\$ 35,054	\$ 46,994	\$ 64,018	16.50%

Source: Bureau of Economic Analysis, 2020

Table 4 -- Poverty (last 12 months)

County	Percent of Individuals Below Poverty Level	Households Receiving Food Stamps/SNAP	Median Household Income
Baldwin	23.7%	12.0%	\$46,250
Crawford	16.6%	13.8%	\$47,917
Houston	11.6%	10.0%	\$65,870
Jones	11.6%	13.0%	\$63,046
Macon-Bibb	25.0%	20.1%	\$41,317
Monroe	15.5%	6.6%	\$60,491
Peach	20.9%	18.6%	\$50,267
Pulaski	20.4%	19.5%	\$42,213
Putnam	18.7%	13.4%	\$52,910
Twiggs	15.2%	17.3%	\$43,477
Wilkinson	24.7%	15.8%	\$36,896
Georgia	14.3%	12.2%	\$61,224
United States	12.8%	11.4%	\$64,994

Source: U.S. Census Bureau, 2016-2020 ACS 5-Year Estimates

Table 5 -- Commuting Patterns

County	Commute within County	Commute out of County	Commute into County
Baldwin	6,140	9,907	8,819
Crawford	543	4,577	737
Houston	23,657	31,711	23,161
Jones	1,825	9,634	2,641
Macon-Bibb	33,818	26,399	50,323
Monroe	1,885	9,218	6,647
Peach	2,186	8,165	8,071
Pulaski	883	2,258	1,897
Putnam	2,315	5,709	3,449
Twiggs	350	2,731	1,855
Wilkinson	776	2,877	1,913

Source: U.S. Census Bureau, Center for Economic Studies, 2019

Table 6 -- Job Tax Rankings

County	Ranking
Baldwin	19
Crawford	89
Houston	132
Jones	133
Macon-Bibb	56
Monroe	141
Peach	88
Pulaski	63
Putnam	113
Twiggs	81
Wilkinson	82

Source: GA DCA 2022 Rankings

Table 7 -- Labor Force Participation (Age 16 & Over)

County	Prct in Labor Force	Unemployment Rate
Baldwin	52.9%	7.4%
Crawford	52.7%	8.6%
Houston	66.5%	5.5%
Jones	59.4%	4.0%
Macon-Bibb	56.9%	7.4%
Monroe	55.7%	3.7%
Peach	55.4%	9.7%
Pulaski	44.6%	5.2%
Putnam	49.6%	3.5%
Twiggs	45.7%	4.1%
Wilkinson	49.1%	7.5%
Region	58.3%	6.3%
Georgia	63.3%	5.6%
United States	63.4%	5.4%

Source: U.S. Census Bureau, 2016-2020 ACS 5-Year Estimates

Table 8 -- Educational Attainment (Age 25 & Over)

County	Less than 9th Grade	Some HS, No Diploma	HS Grad (or equivalent)	Some College - No Degree	Associate's Degree	Bachelor's Degree	Graduate/ Prof. Degree
Baldwin	3.9%	9.7%	32.6%	20.1%	9.4%	15.0%	9.4%
Crawford	3.7%	13.2%	41.2%	25.2%	6.0%	5.2%	5.4%
Houston	2.6%	4.8%	26.8%	24.0%	10.7%	17.7%	13.2%
Jones	2.6%	5.7%	38.6%	21.6%	10.7%	12.4%	8.4%
Macon-Bibb	4.0%	9.6%	31.0%	22.7%	7.3%	13.5%	11.8%
Monroe	3.5%	9.7%	33.9%	19.9%	6.4%	13.2%	13.4%
Peach	6.0%	9.6%	31.7%	19.8%	10.9%	10.5%	11.5%
Pulaski	9.7%	10.8%	35.6%	24.7%	6.1%	7.6%	5.5%
Putnam	4.5%	7.8%	36.8%	20.3%	7.0%	14.4%	9.1%
Twiggs	4.3%	16.1%	41.9%	20.0%	7.4%	5.3%	5.0%
Wilkinson	4.1%	9.8%	50.1%	18.5%	6.3%	6.9%	4.3%
Region	3.7%	8.1%	31.7%	22.4%	8.8%	14.1%	11.2%
Georgia	4.5%	7.7%	27.5%	20.2%	8.0%	19.7%	12.5%
United States	4.9%	6.6%	26.7%	20.3%	8.6%	20.2%	12.7%

Source: U.S. Census Bureau, 2016-2020 ACS 5-Year Estimates

Table 9 -- Educational Attainment (Age 18-24)

County	Less than HS Grad	HS Grad (or equivalent)	Some College or Associate's	Bachelor's or Higher
Baldwin	12.7%	23.8%	59.5%	4.0%
Crawford	18.4%	40.6%	40.9%	0.0%
Houston	9.8%	33.1%	48.0%	9.1%
Jones	14.9%	47.2%	31.5%	6.4%
Macon-Bibb	14.8%	27.7%	49.8%	7.7%
Monroe	15.1%	42.5%	32.9%	9.5%
Peach	9.1%	24.2%	63.2%	3.5%
Pulaski	18.1%	39.5%	37.3%	5.0%
Putnam	32.5%	43.3%	21.3%	2.8%
Twiggs	47.5%	22.0%	25.7%	4.8%
Wilkinson	26.5%	31.2%	29.7%	12.6%
Region	13.8%	30.7%	48.7%	6.9%
Georgia	15.0%	33.2%	41.8%	10.0%
United States	12.2%	32.1%	43.9%	11.8%

Source: U.S. Census Bureau, 2016-2020 ACS 5-Year Estimates

Table 10 -- 4-Year Graduation Rate by School and District (2021)

System Name	School Name	Graduation Rate
Baldwin County	Baldwin High School	84.8%
Crawford County	Crawford County High School	70.7%
Houston County	Veterans High School	95.2%
	Houston County High School	95.7%
	Perry High School	90.4%
	Northside High School	80.9%
	Warner Robins High School	88.6%
	<i>All Houston County Schools</i>	<i>88.8%</i>
Jones County	Jones County High School	87.0%
Macon-Bibb County	Howard High School	85.4%
	Central High School	85.5%
	Westside High School	75.0%
	Rutland High School	81.4%
	Northeast High School	81.7%
	Southwest High School	74.3%
	<i>All Macon-Bibb County Schools</i>	<i>80.7%</i>
Monroe County	Mary Persons High School	91.0%
Peach County	Peach County High School	84.1%
Pulaski County	Hawkinsville High School	94.4%
Putnam County	Putnam County High School	90.6%
Twiggs County	Twiggs County High School	76.2%
Wilkinson County	Wilkinson County High School	93.9%
State Charter	Academy for Classical Education	99.1%
Statewide	All Public Schools	83.7%

Source: Georgia Dept of Education, 2021 College and Career Ready Performance Index (CCRPI)

Table 11 -- College and Career Readiness (2021)

System Name	School Name	College and Career Readiness Indicator Score (out of 100)	Prct Earning College Credit
Baldwin County	Baldwin High School	41.8	45.8%
Crawford County	Crawford County High School	59.6	54.8%
Houston County	Veterans High School	72.3	75.0%
	Houston County High School	72.6	74.0%
	Perry High School	65.5	67.6%
	Northside High School	47.8	62.4%
	Warner Robins High School	48.1	49.2%
	<i>All Houston County Schools</i>	60.2	66.2%
Jones County	Jones County High School	55.5	54.9%
Macon-Bibb County	Howard High School	51.3	34.9%
	Central High School	56.4	48.2%
	Westside High School	42.4	32.4%
	Rutland High School	53.2	45.8%
	Northeast High School	40.9	35.2%
	Southwest High School	31.7	27.9%
	<i>All Macon-Bibb County Schools</i>	46.7	37.6%
Monroe County	Mary Persons High School	66.8	57.2%
Peach County	Peach County High School	53.6	46.9%
Pulaski County	Hawkinsville High School	66.3	48.3%
Putnam County	Putnam County High School	55.0	54.6%
Twiggs County	Twiggs County High School	55.1	42.0%
Wilkinson County	Wilkinson County High School	55.7	39.2%
State Charter	Academy for Classical Education	63.8	78.2%
Statewide	All Public Schools	54.1	47.4%

Source: Georgia Dept of Education, 2021 College and Career Ready Performance Index (CCRPI)

County	Percent of 3rd Grade Students Reading at or above Grade Level
Baldwin County	30.6%
Crawford County	60.6%
Houston County	69.9%
Jones County	66.5%
Macon-Bibb County	36.3%
Monroe County	68.9%
Peach County	50.0%
Pulaski County	60.0%
Putnam County	59.3%
Twiggs County	58.3%
Wilkinson County	50.0%
Academy for Classical Education	87.5%
Georgia	63.5%

Source: Georgia Dept of Education, Spring 2021 EOG (End of Grade)

Note: Georgia DOE 3rd Grade reading standard equals a Lexile measure of 520 or above.

County	Est. Population Age 16-74	Percent At or Below Level 1 Adult Literacy
Baldwin	35,111	32%
Crawford	9,335	24%
Houston	108,409	20%
Jones	20,744	20%
Macon-Bibb	110,351	30%
Monroe	20,095	23%
Peach	20,247	27%
Pulaski	8,963	31%
Putnam	15,928	24%
Twiggs	6,267	41%
Wilkinson	6,601	31%
Georgia	7,488,794	24%
United States	235,567,149	22%

Source: Institute of Educational Sciences: National Center for Educational Statistics, 2016 Program for the International Assessment of Adult Competencies (PIAAC)

Note1: Population estimates are taken from 2013-2017 ACS 5 Year Estimates

Note2: At or Below Level 1 Adult Literacy is a score below 226 points on a 500 point proficiency scale. Adults at this level can be considered at risk for difficulties using or comprehending print material. Adults at the upper end of this level can read short texts, in print or online, and understand the meaning well enough to perform simple tasks, such as filling out a short form, but drawing inferences or combining multiple sources of text may be too difficult. Adults who are below Level 1 may only be able to understand very basic vocabulary or find very specific information on a familiar topic. Some adults below Level 1 may struggle even to do this and may be functionally illiterate.

Table 14 -- Housing Stock By Type

County	Single Family		Multi-Family		Manufactured Homes		Total
	%	Count	%	Count	%	Count	
Baldwin	64.8%	10,820	19.1%	3,189	16.2%	2,705	16,698
Crawford	60.3%	2,758	4.6%	210	35.0%	1,601	4,573
Houston	78.3%	45,447	15.1%	8,764	6.6%	3,831	58,042
Jones	74.5%	8,131	4.2%	458	21.2%	2,314	10,914
Macon-Bibb	69.0%	40,126	28.0%	16,283	2.9%	1,686	58,154
Monroe	75.6%	7,694	6.3%	641	18.1%	1,842	10,177
Peach	70.8%	7,232	18.3%	1,869	10.9%	1,113	10,215
Pulaski	66.5%	2,529	16.5%	627	17.0%	647	3,803
Putnam	57.0%	5,390	8.6%	813	34.4%	3,253	9,457
Twiggs	60.3%	1,857	2.4%	74	37.2%	1,146	3,080
Wilkinson	72.9%	2,406	2.8%	92	24.4%	805	3,301
Region	71.3%	134,391	17.5%	33,023	11.1%	20,943	188,414
Georgia	72.1%	2,761,620	19.9%	762,223	7.9%	302,591	3,830,264
United States	68.9%	84,302,057	25.5%	31,200,326	5.5%	6,729,482	122,354,219

Source: U.S. Census Bureau, 2016-2020 ACS 5-Year Estimates

Table 15 -- Housing Cost

County	Median Home Value (Owner-Occupied)	Median Monthly Gross Rent
Baldwin	\$128,800	\$717
Crawford	\$121,500	\$685
Houston	\$157,200	\$936
Jones	\$149,700	\$796
Macon-Bibb	\$125,300	\$834
Monroe	\$175,000	\$728
Peach	\$140,100	\$750
Pulaski	\$109,500	\$732
Putnam	\$165,800	\$808
Twiggs	\$71,800	\$682
Wilkinson	\$70,100	\$662
Georgia	\$190,200	\$1,042
United States	\$229,800	\$1,096

Source: U.S. Census Bureau, 2016-2020 ACS 5-Year Estimates

Table 16 -- Housing Condition

County	Housing Units Lacking Complete Plumbing		Housing Units Lacking Complete Kitchen Facilities		No Telephone Service Available		Total
	%	Count	%	Count	%	Count	
Baldwin	0.8%	134	1.0%	167	2.2%	367	16,698
Crawford	0.0%	0	0.0%	0	1.7%	78	4,573
Houston	0.4%	232	0.7%	406	0.9%	522	58,042
Jones	0.2%	22	0.2%	22	1.3%	142	10,914
Macon-Bibb	0.6%	349	1.4%	814	2.0%	1,163	58,154
Monroe	0.8%	81	0.8%	81	2.1%	214	10,177
Peach	0.3%	31	0.1%	10	2.6%	266	10,215
Pulaski	0.3%	11	0.0%	0	0.8%	30	3,803
Putnam	0.8%	76	1.8%	170	1.2%	113	9,457
Twiggs	0.5%	15	0.4%	12	2.0%	62	3,080
Wilkinson	0.1%	3	0.2%	7	2.7%	89	3,301
Region	0.5%	954	0.9%	1,690	1.6%	3,046	188,414
Georgia	0.3%	11,491	0.6%	22,982	1.6%	61,284	3,830,264
United States	0.4%	489,417	0.8%	978,834	1.6%	1,957,668	122,354,219

Source: U.S. Census Bureau, 2016-2020 ACS 5-Year Estimates

Table 17 -- Internet Access

County	Prct Individuals Without Access to Broadband Coverage
Baldwin	11.0%
Crawford	20.0%
Houston	4.0%
Jones	24.0%
Macon-Bibb	3.0%
Monroe	52.0%
Peach	39.0%
Pulaski	22.0%
Putnam	25.0%
Twiggs	67.0%
Wilkinson	50.0%
Georgia	9.1%

Source: Georgia Department of Community Affairs

<i>Table 18 -- Regional Employment by Type and Industry Sector (2001 - 2020)</i>					
Description	2001	2005	2010	2015	2020
Total employment	237,892	256,450	256,993	267,073	272,031
By type					
Wage and salary employment	202,121	208,803	201,679	208,366	210,798
Proprietors employment	35,771	47,647	55,314	58,707	61,233
Farm proprietors employment	2,204	1,837	1,709	1,406	1,444
Nonfarm proprietors employment	33,567	45,810	53,605	57,301	59,789
By industry					
Farm employment	3,012	2,785	2,373	2,570	2,998
Nonfarm employment	234,880	253,665	254,620	264,503	269,033
Private nonfarm employment	181,708	197,648	196,367	211,012	214,944
Forestry, fishing, and related activities	354	335	496	170	631
Mining	1,237	1,003	1,386	1,176	1,160
Utilities	174	173	296	(D)	92
Construction	12,460	14,366	11,101	10,593	10,820
Manufacturing	24,185	20,142	15,064	16,574	14,226
Wholesale trade	5,209	1,709	4,927	4,022	1,177
Retail trade	27,676	28,723	28,665	30,366	28,001
Transportation and warehousing	1,248	2,652	3,297	3,786	7,642
Information	3,494	3,366	2,406	2,542	1,307
Finance and insurance	10,668	11,709	13,554	14,767	15,984
Real estate and rental and leasing	6,410	7,932	8,484	8,215	7,377
Professional, scientific, & technical services	8,554	10,652	11,655	11,205	12,733
Management of companies and enterprises	1,466	1,810	2,395	2,629	1,658
Administrative & waste management services	10,584	14,951	14,141	16,491	18,807
Educational services	4,054	4,646	4,551	4,843	4,772
Health care and social assistance	18,578	23,540	25,701	27,444	30,255
Arts, entertainment, and recreation	2,597	2,699	2,789	3,257	2,931
Accommodation and food services	14,591	17,004	17,341	20,069	19,719
Other services, except public administration	12,835	14,247	15,913	18,041	17,580
Government and government enterprises	53,172	56,017	58,253	53,491	54,089
Federal, civilian	14,227	14,616	17,884	16,173	17,266
Military	6,448	7,006	5,493	4,728	4,859
State and local	32,497	34,395	34,876	32,583	31,964
State government	12,337	12,535	11,854	10,407	10,665
Local government	20,160	21,860	23,022	22,176	21,299

Source: Bureau of Economic Analysis, 2021

(D) Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the totals.

(D) is only shown where there was no data for ANY county.

Table 19 -- Middle Georgia Occupation Projections

SOC	Occupation	2014 Estimated Employment	2024 Projected Employment	Total 2012-2024 Employment Change
00	Total All	210,350	225,530	15,180
11	Management	7,290	7,990	700
13	Business and Financial Operations	12,710	13,610	900
15	Computer and Mathematical	7,050	7,790	740
17	Architecture and Engineering	4,800	5,140	340
19	Life, Physical, and Social Science	1,210	1,300	90
21	Community and Social Services	2,040	2,250	210
23	Legal	2,280	2,420	140
25	Education, Training, and Library	9,300	10,250	950
27	Arts, Design, Entertainment, Sports, and Media	5,350	5,890	540
29	Healthcare Practitioners and Technical	6,600	7,460	860
31	Healthcare Support	10,960	12,140	1,180
33	Protective Service	6,620	7,080	460
35	Food Preparation and Serving Related	14,400	15,460	1,060
37	Building and Grounds Cleaning and Maintenance	12,870	13,790	920
39	Personal Care and Service	7,200	7,850	650
41	Sales and Related	12,140	13,260	1,120
43	Office and Administrative Support	24,150	24,960	810
45	Farming, Fishing, and Forestry	17,300	18,070	770
47	Construction and Extraction	6,730	7,080	350
49	Installation, Maintenance, and Repair	9,000	9,480	480
51	Production	13,430	14,330	900
53	Transportation and Material Moving	12,410	13,210	800

Source: Georgia Dept. of Labor, Workforce Statistics & Economic Research, Projection Unit, July 2021

Table 20 -- Innovation (by Middle Georgia County)

County	National Rank (3,110 Counties)	Headline Innovation Index	Human Capital & Knowledge Creation	Business Dynamics	Business Profile	Employment & Productivity	Economic Well-Being
Baldwin	1,883	110.1	115.4	117.9	68.2	127.7	121.4
Crawford	2,392	105.2	114.9	117.6	74.1	100.4	118.9
Houston	757	122.2	140.1	128.7	83.2	124.9	134.2
Jones	1,949	109.4	116.6	111.8	74.1	116.0	128.7
Macon-Bibb	894	120.1	131.6	125.5	92.4	135.9	115.0
Monroe	1,044	118.2	128.7	143.7	71.8	117.9	128.9
Peach	1,342	115.1	130.1	112.6	89.3	126.5	117.2
Pulaski	2,628	102.8	97.7	119.8	64.8	114.1	117.6
Putnam	1,296	115.7	117.7	153.3	71.2	110.2	125.9
Twiggs	2,615	102.9	108.3	118.8	83.8	111.0	92.4
Wilkinson	2,978	96.3	99.3	106.2	60.7	112.2	103.3

Source: Indiana Business Research Center, StatsAmerica, Innovation Intelligence, 2022

Table 21 -- Innovation (by Georgia Regional Commission/Economic Development District)

Regional Commission	National Rank (393 EDDs)	Headline Innovation Index	Human Capital & Knowledge Creation	Business Dynamics	Business Profile	Employment & Productivity	Economic Well-Being
Northwest Georgia	183	108.2	100.9	118.6	107.2	119.9	94.6
Georgia Mountains	105	116.5	108.6	149.1	103.2	118.3	103.4
Atlanta	21	137.4	142.3	146.8	136.8	130.6	130.3
Three Rivers	155	111.3	106.6	118.8	106.2	118.2	106.9
Northeast Georgia	47	128.7	134.9	158.1	127.4	115.0	108.0
Middle Georgia	236	104.3	115.1	119.1	101.2	105.5	80.7
Central Savannah River Area	204	106.8	114.0	106.9	104.3	120.0	88.9
River Valley	306	97.1	103.6	93.3	87.6	110.8	90.2
Heart of Georgia-Altamaha	369	87.3	84.0	99.3	78.6	105.3	69.4
Southwest Georgia	356	89.3	85.3	89.5	92.4	99.4	79.7
Southern Georgia	322	95.3	92.9	112.4	87.3	105.6	78.1
Coastal	107	116.3	119.7	131.0	110.5	112.3	108.2

Source: Indiana Business Research Center, StatsAmerica, Innovation Intelligence, 2022