



Front Royal Economic Development Authority Meeting

Monday, March 4, 2024 @ 12:00pm

Town Hall East Conference Room

This meeting may be viewed in its entirety by accessing the video of the same date online via the Town's website at www.frontroyalva.com.

1. Roll Call – *Hillary Wilfong*
2. * Approval of Minutes - *I move that FREDa approve the Regular Meeting minutes of February 5, 2024, and Work Session minutes of February 12, 2024, as presented.*
3. Old Business
 - A. Memorandum of Understanding (MOU) for Operational and Financial Support - Approved
 - B. Revision of Bylaws and Town Code Chapter 16 (Update)
 - C. Continued Goal Setting
4. New Business
 - A. Review of the Comprehensive Economic Development Strategy (CEDS)
5. Open Discussion – *Chairman*
6. Next Meeting – Monday, April 1, 2024
7. Adjourn

* *Action Item - Vote*



FRONT ROYAL ECONOMIC DEVELOPMENT AUTHORITY (FREDA) MEETING MINUTES

Monday, February 5, 2024, at 12:00pm

Town Hall Upstairs Conference Room

The following minutes are a summary of items on the agenda.

This meeting may be viewed in its entirety by accessing the video of the same date online via the Town's website at www.frontroyalva.com.

ROLL CALL PRESENT: Chairman Richard M. Novak
Director Aiden Miller
Director David Gedney
Director Frank Stankiewicz
Director Nicholas C. Bass
Director Robert Elliott
Director Thomas Eshelman -*absent*
Director Frank Stankiewicz -*absent*

SUPPORT STAFF PRESENT: Town Manager Joseph Waltz
Director of Community Development and Tourism Elizabeth Lewis
Executive Administrative Assistant Hillary Wilfong
IT Director Charles Hutchings

Approval of Minutes

Director Miller moved to approve the minutes from the regular January meeting and work session, seconded by Director Bass. All in favor, no opposition, no abstentions. Motion carries.

Strategic Planning

During the January work session, the Board drafted a vision statement to serve as a guide and provide clarity of the Boards purpose and have a defined direction for growth and goals.

The vision statement: *"To sustain and grow a healthy economy that provides opportunity and protects the characteristics that make Front Royal a unique community."*

Director Elliott apologized for not being at the work session and shared his thoughts on adding tax base into either the vision or mission statement, and potentially a better term would be diversified tax base. Director Bass suggested that if we decided to use a tax base, it would be best suited for the Press Release. Chairman Novak agreed and shared that the vision statement encompasses the goals to grow a tax base without using the words. Chairman Novak asked if there was any farther discussion regarding the vision statement.

Director Nick made a motion to approve the drafted vision statement, Director Miller seconded the motion. All in favor, no opposition, no abstentions. Motion carries.

Director Bass presented the draft mission statement to the Board. *"Provide leadership necessary for the Front Royal community to optimize economic impact and improvement opportunities."*

Director Miller noted that he liked the mission statement, however the sequence or continuity of the words is what he is struggling with. The Board agreed that it wasn't as concise as they had hoped. The Board then re-drafted the mission statement as follows: *"To provide leadership necessary for Front Royal to optimize economic opportunity and community improvement."*

Director Miller made a motion to approve the draft mission statement, the motion seconded by Director Elliott. All in favor, no opposition, no abstentions. Motion carries.

Chairman Novak discussed the themes that were decided upon from the work session, the five main goals were workforce development, existing businesses, future business, asset development and infrastructure. Ms. Lewis asked the Board if any of the members were more passionate about one than the other that they may like to lead that theme. Chairman Novak advised that our Board is too small to have a bunch of sub committees. Director Gedney suggested that we work on an individual theme at each of our work sessions, as that would seem more productive, the Board agreed.

Mr. Waltz advised that prior to the work session, he will send out a survey to the Board with the comp plan goals and allow the Board to rate each goal to then go into a bucket under each theme.

Chairman Novak petitioned the Board to set a date for the next work session. The Board agreed upon Monday, February 12th at 12:30pm in the Town Hall East Conference Room.

Old Business

Ms. Lewis drafted and distributed a press release to the Board which will update the public regarding the Front Royal Economic Advisory Board. The press release will have the new vision and mission statement, future goals, and the new branding, with the Business Development Board title. The Board was pleased with the press release and noted that the mission statement will be updated to reflect the changes made today as well as adding diversified tax base.

Director Miller made a motion to approve the press release for dissemination with the changes, Director Bass seconded the motion. All in favor, no opposition, no abstentions. Motion carries.

Ms. Lewis also presented the Board with two different zoning maps; Ms. Lewis will email the Board with a copy to have.

Open Discussion

Director Elliott suggested to the Board that a spreadsheet is created of all the current businesses and properties in Town, allowing us to help old/new businesses that may need space or assistance with what they are looking for. Chairman Novak advised that Director Gedney has already started working on a list of current business in the area and we hope to have a list of properties soon. Director Elliott also suggested reaching out to property owners with vacant land or building space. Director Gedney proposed that we have a directory of forms and other useful information on how to become a business owner in Front Royal, such as tax credit forms. Chairman Novak agreed that we need to have resources available to the public for current and future business owners.

Director Elliott also wanted to make sure he was on the email list to receive notifications from citizens; Ms. Lewis affirmed that he has been added, and all current members of the Board are on the list. Ms. Lewis also discussed protocol for emails, since each member of the Board receives the same email, if you respond please respond back to the Board, by either CCing or replying to all. Ms. Lewis also asked if the Board wanted to be included in all of the emails, at this time the Board agreed to still receive all emails.

Chairman Novak also shared that Rob McDougall owner of the Murphy Building located downtown has reserved a space at Royal Cinemas on February 27th from 11am-1pm to discuss potential opportunities for the building space, Chairman Novak advised that it is open to the public and encouraged the Board to attend. Mr. Waltz advised that if two or more members

are meeting or attending the same event, the press must be notified. Ms. Lewis shared that within this policy, the press just has to be notified, a press release of an unscheduled meeting is not necessary.

Lastly, Director Elliott discussed having documents stored electronically, allowing it to be easier for the Board to share and use for future references. Mr. Waltz will follow up with Town staff, as the Town already uses a program called Box, to share documents.

Next Meeting

The Board agreed to have a work session meeting on February at 12:30pm.

The next regular scheduled meeting is on Monday February 5th at noon.

Adjourn

Chairman Novak asked for a motion to adjourn at 1:02pm, motion made by Director Bass and seconded by Director Miller.



FRONT ROYAL ECONOMIC DEVELOPMENT AUTHORITY (FREDA) WORK SESSION MINUTES

Monday, February 12, 2024 at 12:30 pm

Town Hall Upstairs Conference Room

The following minutes are a summary of items on the agenda.

This meeting may be viewed in its entirety by accessing the video of the same date online via the Town's website at www.frontroyalva.com.

ROLL CALL PRESENT: Chairman Richard M. Novak
Director Aiden Miller
Director David Gedney
Director Frank Stankiewicz-absent
Director Nicholas C. Bass
Director Robert Elliott
Director Thomas Eshelman- absent

SUPPORT STAFF PRESENT: Town Manager Joseph Waltz
Director of Community Development and Tourism Elizabeth Lewis
Administrative Assistant Hillary Wilfong
IT Director Charles Hutchings

Goal Setting Discussion

Ms. Lewis presented the Board with the five themes decided upon from the last meeting; infrastructure, existing businesses, new businesses, workforce, and asset development. Each theme had specific goals from the recently adopted Town Comprehensive Plan that the FREDA Board selected. Each present board member reviewed the themes and selected their level of priority for each goal. The Board reviewed each goal and decided on the following.

Infrastructure

Continue to support the growth of the Inland Port as it relates to the Town.

Existing Businesses

Start a dialogue and conduct interviews with existing businesses about how to grow the local economy.

Create a directory of incentive resources and other helpful resources to help with expansions and loans.

Partner with a Buy Local campaign that encourages residents and visitors to shop locally with retail and restaurants.

New Businesses

Identify target sectors in an economic development plan, identify infrastructure needs that will support these sectors, and market Front Royal to them.

Attract businesses that support that are limited in Town, such as clothing stores and other shops that are not presently found in the market.

Workforce

Partner with local education and vocational resources to provide a skilled labor force.

Asset Development

Support: Create a vibrant arts and music scene and build new outdoor amenities to make Town attract

Support: Continue marketing and branding efforts around Front Royal as a "gateway to the outdoors."

Study the various chains of activity for how residents and visitors spend time in FR to identify gaps in attractions and land uses.

The Board was pleased with the five themes and goals that were selected to be their focus. The Board discussed needing a list of what we have so we can determine what we, the Town, need, this includes businesses and properties which will help in facilitating in completing these goals. The Board suggested reaching out to the Chamber of Commerce who may already have a list of all the businesses. The Board also agreed that we need to draft questions for a survey for local businesses and create a list of resources that we can include on our website.

Ms. Lewis shared that the Director of Planning and Zoning Lauren Kopishke would like to attend some of our meetings and help answer any questions as needed.

Next Meeting

The next FREDa meeting is on Monday, March 4th at noon.

Adjourn

Chairman Novak asked for a motion to adjourn at 10:27 am. Director Miller made the motion to adjourn, seconded by Director Bass. Motion carried.



NORTHERN SHENANDOAH VALLEY REGION

Comprehensive Economic Development Strategy

PREPARED FOR:
Northern Shenandoah Valley Regional Commission
400-E Kendrick Lane
Front Royal, VA 22630

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EXECUTIVE SUMMARY

Spurred by a desire to increase their capacity to engage with localities on critical issues facing the region, the Northern Shenandoah Valley Regional Commission (NSVRC) decided to lead and facilitate the process to create a Comprehensive Economic Development Strategy (CEDS). A CEDS is a requirement from the Economic Development Administration (EDA) to become a designated Economic Development District (EDD), and not only aligns the region's economic development initiatives, but opens the door to additional federal funding for economic development endeavors.

During the CEDS planning process, the NSVRC and Camoin Associates engaged a broad spectrum of stakeholders with interviews, focus groups, committee meetings, and advisory group presentations. The process was informed by a wealth of information, including existing planning studies for the region and each of its localities.

The CEDS includes a thorough assessment of the economic conditions of the region; an analysis of the region's strengths, weaknesses, opportunities, and threats (a SWOT analysis); an action plan matrix that outlines specific strategies that build on strengths and mitigate weaknesses; and performance measures which will help the NSVRC and their partners track the progress of strategies overtime.

The CEDS is a road map to help the NSVRC and their localities build resilient economies by leveraging existing assets, while also developing goals for the future. While not every single objective will be pertinent to every locality, in sum they will collectively increase prosperity throughout the region. A collaborative approach across public and private sectors will be imperative to the successful implementation of this plan, as is an annual review and update of the plan.

What is a Comprehensive Economic Development Strategy?

A CEDS is a key component in establishing and maintaining a robust, diverse economic ecosystem. The CEDS provides a platform for individuals, organizations, local governments, institutes of learning, and private industry to engage in a meaningful conversation about how local strengths can be leveraged to improve overall quality of life and how barriers can be overcome to achieve goals. Establishing regional economic development goals through an intensive planning process is not only important in terms of establishing roles and responsibilities among stakeholders, completing an EDA-approved CEDS unlocks federal and state funding sources that are invaluable to localities who may not otherwise have access to capital.¹

¹ Adapted from the Economic Development Administration website

ABOUT THE NORTHERN SHENANDOAH VALLEY REGION

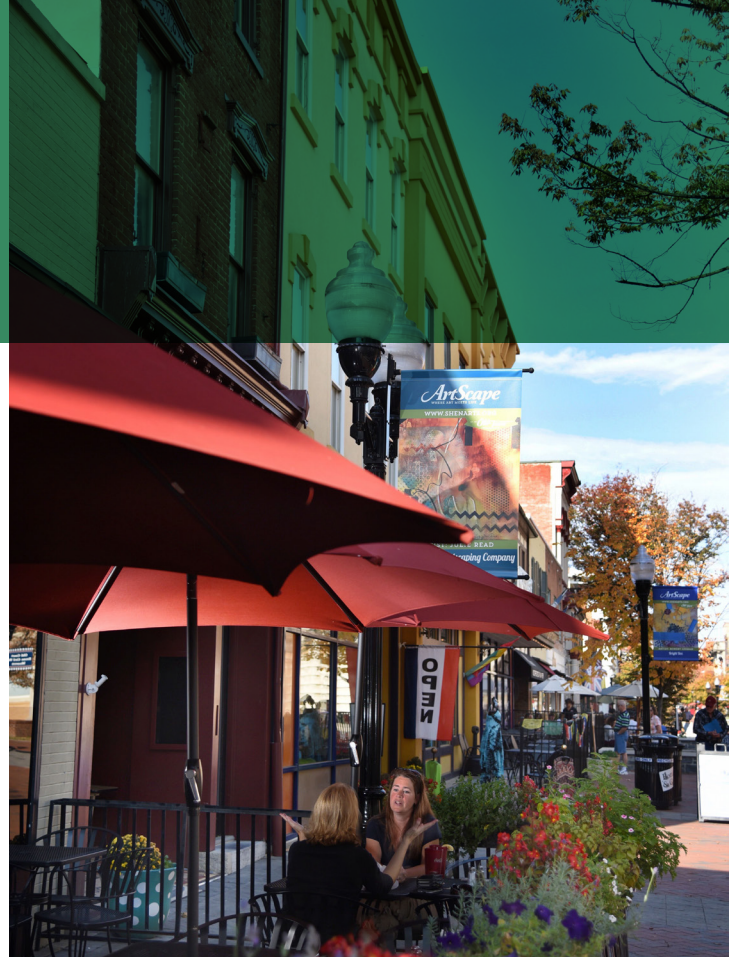
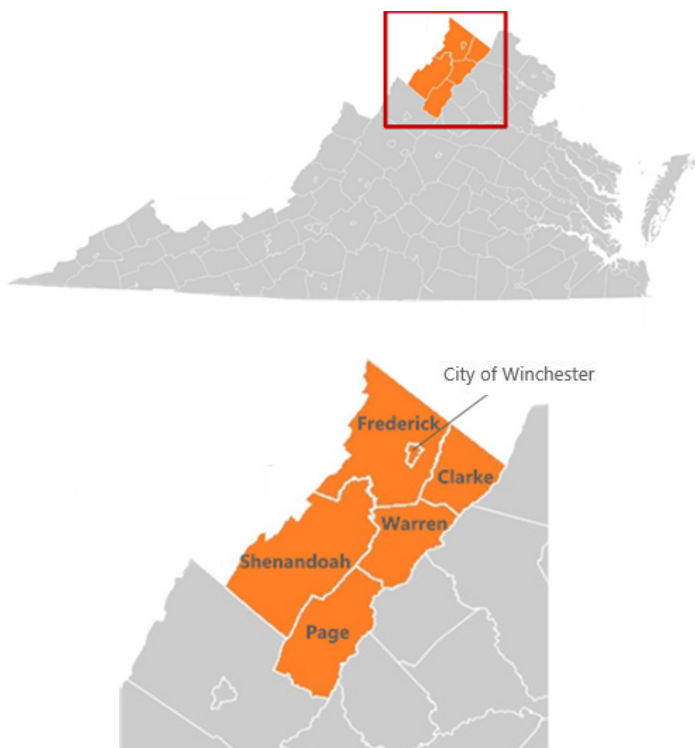
WHO WE ARE

The Northern Shenandoah Valley Regional Commission (NSVRC) is comprised of Frederick County, City of Winchester, Clarke County, Shenandoah County, Warren County and Page County in the northwest corner of Virginia (NSV Region). This area encompasses about 1,645 square miles.

WHAT WE DO

NSVRC is a state-established planning district, one of 21 in Virginia. Its mission is to pursue the common interests of its local governments with the goal of creating efficiencies through collaboration. The Northern Shenandoah Valley Regional Commission is now seeking to become an Economic Development Administration (EDA) designated Economic Development District (EDD).

The Northern Shenandoah Valley Region



Regional Strengths

- 1 Strong agricultural center
- 2 Existing planning efforts
- 3 Rich in natural resources
- 4 Diverse mix of educational institutions
- 5 Proximity to major population centers
- 6 Excellent transportation routes

Expected Outcomes of CEDS

- 1 Higher wages
- 2 Job creation
- 3 Enhanced quality of life
- 4 A dynamic workforce prepared for technology advancements
- 5 Improved visitor experience
- 6 Asset based economic development



Vision Statement

“The Northern Shenandoah Valley is a place where residents are meaningfully employed, beautiful natural resources are readily accessible, and a supportive business environment creates opportunity for residents and newcomers alike.”



How do we get from vision to reality?

Achieving the vision will take dedicated partners, resources and regular progress updates. The Action Plan Matrix is the NSVRC’s tool to monitor progress and adjust as economic circumstances change. The Action Plan Matrix is divided up into 5 goal areas that were vetted by the CEDS Project Team and subject matter experts. Beneath each goal area are the objectives and specific tasks that will drive success. Each task is designated a priority level, anticipated resources, and most importantly a responsible party to facilitate implementation. Regular review and update of the Action Plan Matrix is key to maintaining momentum in the implementation process.



Five primary goal areas were translated into actions with associated objectives and tasks, as shown below. Goal areas include workforce, visitation, business development and support, site readiness, and environmental resiliency.

GOAL AREA 1: WORKFORCE

Expand workforce opportunities and address training gaps by increasing partnerships across the Northern Shenandoah Valley region.

GOAL AREA 2: VISITATION

By supporting regional and local efforts, help highlight the region's natural amenities and quality of life to boost the tourism industry, preserve natural resources, and draw new residents.

GOAL AREA 3: BUSINESS DEVELOPMENT & SUPPORT

Support efforts to retain and expand existing businesses to increase profitability and community vitality. Target those that are economically supported by the region's unique assets.

GOAL AREA 4: SITE READINESS

Work with partners across the Northern Shenandoah Valley Region to increase site readiness through upgrades to broadband services, utilities, and other physical infrastructure.

GOAL AREA 5: HAZARD AWARENESS & ENVIRONMENTAL RESILIENCY

Develop and implement programs to increase the awareness of natural hazard mitigation efforts that target the public and local governments.

In the body of the report, tasks are identified with additional information including lead stakeholder, priority level and timeframe, funding sources, and resources. In addition, performance measures were added to guide next steps and implementation. A full action plan matrix can be found beginning on page 33.

NORTHERN SHENANDOAH VALLEY REGIONAL COMMISSION ACTION PLAN SUMMARY

GOAL AREA 1: WORKFORCE

Expand workforce opportunities and address training gaps by increasing partnerships across the Northern Shenandoah Valley region.

OBJECTIVE 1.1 Understand capacity of service providers in the Northern Shenandoah Valley Region and measure the effectiveness of their programs.

OBJECTIVE 1.2 Continue ongoing monitoring of workforce needs.

OBJECTIVE 1.3 Enhance regional collaboration as it relates to developing a sustainable workforce.

OBJECTIVE 1.4 Increase awareness of workforce opportunities by promoting regional career pathways.

OBJECTIVE 1.5 Identify, evaluate, and reduce barriers to training and employment in the Northern Shenandoah Valley.



GOAL AREA 2: VISITATION

By supporting regional and local efforts, help highlight the region's natural amenities and quality of life to boost the tourism industry, preserve natural resources, and draw new residents.

OBJECTIVE 2.1 Support the Shenandoah Valley Tourism Partnership and the Shenandoah Valley Tourism Association as they work to strengthen activities that brand and promote the region.

OBJECTIVE 2.2 Partner with localities and tourism agencies to increase transportation options surrounding recreational and natural assets.

OBJECTIVE 2.3 Develop recreational trails.





GOAL AREA 3: BUSINESS DEVELOPMENT & SUPPORT

Support efforts to retain and expand existing businesses to increase profitability and community vitality. Target those that are economically supported by the region's unique assets.

OBJECTIVE 3.1 Work with localities in the Northern Shenandoah Valley to strengthen the Agribusiness industry, support farmers, and cultivate programs to expand the industry's output and geographic reach.

OBJECTIVE 3.2 Partner with and support those localities in the Northern Shenandoah Valley who are working to retain and expand existing businesses and attract new businesses.

OBJECTIVE 3.3 Strengthen and promote the role of the NSVRC as a regional resource hub for localities and their economic development and planning departments.

OBJECTIVE 3.4 Partner with government, public schools, universities and colleges, and businesses to become an entrepreneurial region of innovative ideas and technologies capable of fulfilling future market demand.



GOAL AREA 4: SITE READINESS

Work with partners across the Northern Shenandoah Valley Region to increase site readiness through upgrades to broadband services, utilities, and other physical infrastructure.

OBJECTIVE 4.1 Ensure there is a regional inventory of sites available to suit target industry clusters with <18 months to market.

OBJECTIVE 4.2 Continue to discuss region-wide infrastructure needs and track ongoing projects with localities



GOAL AREA 5: HAZARD AWARENESS & ENVIRONMENTAL RESILIENCY

Develop and implement programs to increase the awareness of natural hazard mitigation efforts that target the public and local governments.

OBJECTIVE 5.1 Offer hazard mitigation and disaster preparedness training to educate the public and localities about the dangers of natural hazards.

OBJECTIVE 5.2 Use data to help show current efforts and existing needs in hazard mitigation efforts.

OBJECTIVE 5.3 Rectify the pollution of the Shenandoah River and Chesapeake Bay Watershed from Agricultural byproducts and runoff.

OBJECTIVE 5.4 Increase spatial awareness of region-wide physical, human and environmental geographic physiognomies.



Implementation

The planning process for the CEDS was initiated understanding that developing relationships among stakeholders in the public and private sectors would be essential to successful implementation. The factors, partners and other resources expected for implementation are detailed in the Action Plan Matrix, contained in Appendix D. Potential funding sources available, as well as those the NSVRC can pursue are already established so that the organization can launch into implementation. NSVRC anticipates taking on the role of facilitator, while enabling local experts to take on goal areas that match their expertise. Additionally, each objective has a performance measure, which will be updated along with other necessary elements during each annual review of the CEDS required by the Economic Development Administration.





Acknowledgements

The CEDS was a collaborative effort that came together successfully because of **the valuable contributions of community members** around the Northern Valley Shenandoah region. For a list of the full CEDS Project Team and other regional stakeholders please see Appendix H.

Special recognition goes to **Brandon Davis**, Executive Director and **Ashley Shickle**, Strategic Planner at the Northern Shenandoah Valley Regional Commission, who have been instrumental in the completion of this report.

Thank you also to the team at Camoin Associates who facilitated the planning process and coordinated the CEDS development.

CONSULTANT TEAM

Project Principals

Dan Gundersen, *Senior Vice Principal*

Michael N'dolo, *Vice President*

Project Manager

Alexandra Tranmer, *Project Manager*

Project Staff

Amie Collins, *Analyst*



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Appendix A: Background Conditions

Introduction

The Northern Shenandoah Valley Regional Commission (NSVRC) is a state-established planning district, one of 21 in Virginia. Its mission is to pursue the common interests of its local governments with the goal of creating efficiencies through collaboration. The Northern Shenandoah Valley Regional Commission is now seeking to become an Economic Development Administration (EDA) designated Economic Development District (EDD).

This data report for the NSVRC meets part of the requirements to complete a Comprehensive Economic Development Strategy (CEDS). The CEDS process was created by the EDA and serves as a tool to effectively identify economic opportunities and establish ways to enhance a region's economic ecosystem. In addition to an effective economic development planning tool, it is also a precursor to EDD designation from the EDA.

This report concentrates on summary background data including an analysis of demographic and economic data. This information will be used to inform subsequent requirements of the CEDS process. In addition to this summary background of information, the CEDS document requires a SWOT (Strengths, Weakness, Opportunities and Threats) analysis, action plan, and evaluation framework. These will be created at a later date.

Summary Background

The purpose of this section is to provide an understanding of the economic situation in the Northern Shenandoah Valley region. This report contains historical, current and projected figures to help us understand not only where the region stands today, but also patterns and trends over the last several years. Data in the report includes demographic and socioeconomic data; emerging industry clusters; and occupational data. Examining the larger economic picture helps to understand what initiatives have and have not worked and to determine a course forward as the planning process moves towards strategy development.

Key Findings

Demographic Data

- The population in the NSV Region is on the rise, projected to increase from 234,304 to 244,314 by 2022 (just over 4%). Median age is projected to increase slightly as well, from 41.5 in 2017 to 42.1 in 2022.
- Frederick County encompasses the majority of the population at 36% of total. Clarke County represents the least populated locality with 6% of the total population.
- In general, distribution of age within the NSV Region is similar among each locality with 25% of the population 19 or younger; 30% ages 20 and 44; 29% between the ages of 45 and 64; and 16% of the population 65 years old and older.
- Within the region, 86% of those age 25 and older have a high school education, and 25% of the population have a bachelor's degree or higher.
- Median household income is projected to increase to \$62,611 (8% or roughly \$4,800) by 2022.
- ALICE (Asset, Limited, Income, Constrained, Employed) represents individuals and families who earn more than the Federal Poverty Level, but less than the basic cost of living. Within Clarke, Frederick, Page, Shenandoah and Warren Counties, nearly a third of all households are income constrained. In Winchester, over a third (36%) of households are considered ALICE.

Industry Data

- While the number of jobs marginally declined from 2006 to 2016, jobs are expected to grow from 2016 to 2026. From 2016 to 2026, an increase of over 9,000 jobs, or 9%, is anticipated.
- The industries with the greatest employment includes Government¹ (14,845), Health Care and Social Assistance (12,922), Manufacturing (12,770), and Retail Trade (12,452). The Accommodation and Food Services industry is the fifth largest sector with just over 8,500 jobs.
- From 2006 to 2016, the Construction and Manufacturing industries lost the most jobs. Retail Trade, Wholesale Trade, and Real Estate Rental and Leasing also lost a significant number of jobs, over 1,000 in total. Conversely, Healthcare and Social Assistance, Government, and Accommodation and Food Services saw the biggest increases adding just over 6,000 jobs total.
- From 2016 to 2026, projections indicate a more favorable job atmosphere growing by about 9,300 by 2026. Industries with the most significant growth include Healthcare and Social Assistance, Government, Finance and Insurance, and Professional Services.
- The NSV Region has a high concentration in several industries which include Plastics Product Manufacturing, Depository Credit Intermediation, Warehousing and Storage, Printing and Related Support Activities, Gasoline Stations, and Animal Slaughtering and Processing.
- Following trends in overall job numbers, the number of self-employed workers decreased between 2006 and 2016 the NSV Region lost roughly 1,200 self-employment jobs. However, between 2016 and 2026 an increase of 6,700 jobs is projected.
- The labor force in the region spans from a 59% participation rate in Page County to a 68% participation rate in Frederick County. Unemployment is the highest in Page County at around 9% and is the lowest in Frederick County and the City of Winchester at 5%.

Occupational Data

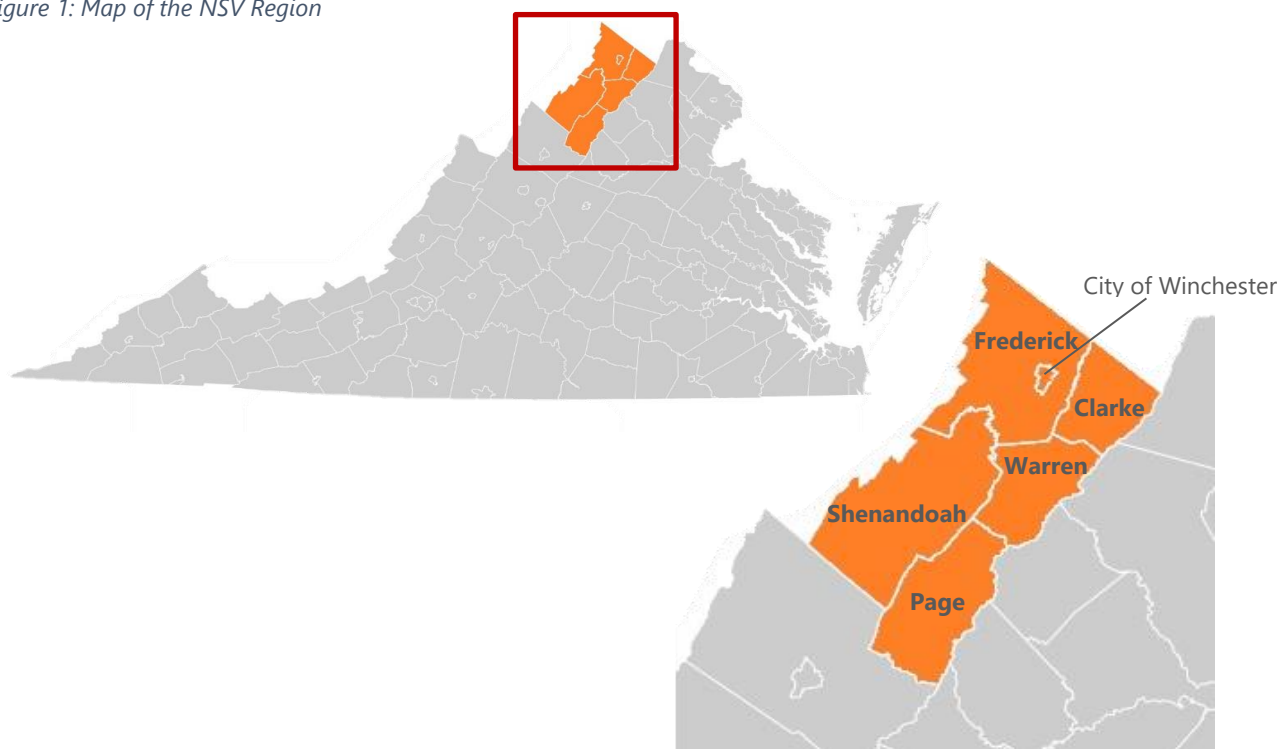
- The largest occupations are the Office and Administrative Support Occupation (14,584 total jobs), Transportation and Material Moving Occupations (8,311), and Production Operations (8,185). These occupations are expected to grow by about 1,700 cumulatively over the next five years.
- There are no clear leaders when examining the top occupations, indicating a diverse occupational distribution, but many of the top occupations have average wages of less than \$15 per hour.
- The unemployment rate for the region ranges from a high of 8.6% in Page County to a low of 4.8% in Clarke County. The labor force participation rate ranges from a high of 68% in Frederick County to a low of 58.9% in Page County.
- The NSV Region has 28,065 workers who commute in from outside of the region to work, while 47,089 workers who live in the region commute elsewhere for work. Additionally, 51,819 workers both live and work in the region. This results in a net loss of 19,024 workers from the Region.

¹ Note that Government also includes state-owned health and education facilities.

NSV Region Geography

The Northern Shenandoah Valley Regional Commission is comprised of Frederick County, City of Winchester, Clarke County, Shenandoah County, Warren County and Page County in the northwest corner of Virginia (NSV Region). This area encompasses about 1,645 square miles and is the geography used for this analysis.²

Figure 1: Map of the NSV Region



Demographic Analysis

Population

Within the NSV Region, the total population increased just over 12,000 people between 2010 and 2017 and is expected to increase by another 10,000 from 2017 to 2022. Similarly, the total number of households has and will continue to increase, rising 4,085 from 2010 to 2017 and 3,556 from 2017 to 2022. These changes are on par with the state as a whole. Median age is also projected to increase from 41.5 in 2017 to 42.1 in 2022; when compared to the state the NSV Region is slightly older in each year.

Table 1: NSV Region and Virginia Population Comparison, 2010-2022

NSV Region and Virginia Population Comparison, 2010 - 2022										
	2010		2017		2022		Percent Change 2010-2017		Percent Change 2017-2022	
	NSV	VA	NSV	VA	NSV	VA	NSV	VA	NSV	VA
Total Population	222,152	8,001,024	234,304	8,513,496	244,314	8,910,798	5.5%	6.4%	4.3%	4.7%
Total Households	85,887	3,056,058	89,972	3,234,614	93,528	3,376,509	4.8%	5.8%	4.0%	4.4%

Source: Esri

² NSVRC Hazard Mitigation Plan Update, DRAFT December 2017 <http://www.nsvregion.org/hazard-mitigation.html>

Table 2: NSV Region and Virginia Demographic Comparison, 2010-2022

NSV Region and Virginia Demographic Comparison, 2010 - 2022						
	2010		2017		2022	
	NSV	VA	NSV	VA	NSV	VA
Average Household Size	2.55	2.54	2.57	2.56	2.57	2.57
Median Age	40.3	37.4	41.5	38.5	42.1	39.3

Source: Esri

Table 3 indicates the number and proportion of residents within each locality of the NSV Region. Among the six localities that comprise the NSV Region, Frederick County encompasses the majority of the population with 81,340 residents at 36%. Clarke County represents the least populated locality with 14,299 residents or 6% of the total NSV Region population.

Table 3: 2015 NSV Region Population

2015 NSV Region Population		
Locality	Total	Percent of NSV
Clarke County	14,299	6%
Frederick County	81,340	36%
Page County	23,843	10%
Shenandoah County	42,724	19%
Warren County	38,841	17%
Winchester	27,168	12%
NSV	228,215	100%

Source: U.S. Census Bureau, American Community Survey, 2015

Race and Ethnicity

Among the NSV Region, 85% of the population identifies as White. As of 2015, the locality with the highest proportion of individuals identifying as White is Page County (95%) and the lowest is the City of Winchester (68%). Sixteen percent of Winchester's population identifies as Hispanic, the highest in the NSV Region. Winchester also has the highest percent of individuals identifying as Black in the NSV Region at 10%. See Table 4 for a complete breakdown of race and ethnicity by NSV Region locality. Note that the Hispanic ethnicity is considered a separate category for this analysis.

Table 4: 2015 NSV Region Population by Race and Ethnicity

2015 NSV Region Population by Race and Ethnicity												
Locality	White		Black		Hispanic		Asian		Other		Total	
	#	%	#	%	#	%	#	%	#	%	#	%
Clarke County	12,496	87%	784	5%	581	4%	124	1%	314	2%	14,299	100%
Frederick County	69,273	85%	3,587	4%	5,877	7%	1,143	1%	1,460	2%	81,340	100%
Page County	22,569	95%	381	2%	426	2%	123	1%	344	1%	23,843	100%
Shenandoah County	38,050	89%	904	2%	2,886	7%	219	1%	665	2%	42,724	100%
Warren County	33,831	88%	1,530	4%	1,509	4%	401	1%	1,210	3%	38,481	100%
Winchester	18,444	68%	2,824	10%	4,430	16%	652	2%	818	3%	27,168	100%
NSV	194,663	85%	10,010	4%	15,709	7%	2,662	1%	4,811	2%	227,855	100%

Source: U.S. Census Bureau, American Community Survey, 2015

Age

In general, distribution of age within the NSV Region is similar among each locality. In the entire NSV Region, 25% of the population is 19 or younger; 30% ages 20 to 44; 29% between the ages of 45 and 64; and 16% of the population 65 years old and older. Shenandoah County has the highest population of those 65 and over (20%) indicating it may have the most need to care for this population. Frederick County is the locality with the highest number of people between 0 to 19 (about 21,200 people). Looking forward, an aging population will have implications across the region, especially to those counties where a quarter or more of their population is approaching retirement age.

Table 5: 2015 NSV Region Population by Age

2015 NSV Region Population by Age										
Locality	0 to 19		20 to 44		45 to 64		65+		Total	
	#	%	#	%	#	%	#	%	#	%
Clarke County	3,489	24%	3,560	25%	4,565	32%	2,685	19%	14,299	100%
Frederick County	21,197	26%	25,218	31%	23,105	28%	11,820	15%	81,340	100%
Page County	5,412	23%	6,768	28%	7,054	30%	4,609	19%	23,843	100%
Shenandoah County	9,857	23%	12,018	28%	12,437	29%	8,412	20%	42,724	100%
Warren County	9,820	26%	11,727	30%	11,510	30%	5,424	14%	38,481	100%
Winchester	7,107	26%	9,130	34%	7,041	26%	3,890	14%	27,168	100%
NSV	56,882	25%	68,421	30%	65,712	29%	36,840	16%	227,855	100%

Source: U.S. Census Bureau, American Community Survey, 2015

Educational Attainment

Within the entire NSV Region, 86% of those age 25 and older have a high school education, and 25% of the population have a bachelor's degree or higher. Across the NSV region, 8% have an Associate's degree, and 6% have a GED or alternative credential. Relative to other NSV Region localities, Page County has the lowest educational attainment figures, with 78% of those 25 and older having a high school education and 14% of the population holding a bachelor's degree or higher. Clarke County has the highest relative educational level with 89% of the population obtaining a high school education and 32% earning a bachelor's or higher.

Table 6: 2017 Educational Attainment by NSV Region Locality

2017 Educational Attainment by NSV Region Locality							
Educational Attainment	Clarke Co.	Frederick Co.	Page Co.	Shenandoah Co.	Warren Co.	Winchester	NSV
Less than 9th Grade	5%	4%	9%	6%	4%	7%	6%
9-12th Grade/No Diploma	7%	7%	12%	8%	9%	7%	8%
High School Diploma	23%	24%	33%	33%	29%	25%	28%
GED/Alternative Credential	5%	6%	10%	7%	7%	4%	6%
Some College/No Degree	21%	20%	17%	20%	19%	17%	19%
Associate's Degree	8%	8%	5%	6%	9%	8%	8%
Bachelor's Degree	19%	19%	9%	13%	15%	16%	16%
Graduate/Professional Degree	13%	11%	5%	7%	7%	14%	9%
Total	100%	100%	100%	100%	100%	100%	100%

Source: Esri

Income

In sum, income is expected to increase both by per capita income and by median household income. Per capita income is the sum of all income divided by the total population. If a given population has incomes on either extreme, it can skew the number up or down. For this reason, we also examine median household income. Median household income is the income amount for which half the households are above, and half the households are below. For the NSV Region, per capita income is projected to increase by 14% or just under \$4,000. Median household income is projected to increase by 8% or roughly \$4,800.

Table 7: NSV Region Income, 2017-2022

NSV Region Income, 2017 - 2022				
	2017	2022	Change 2017-2022	Percent Change 2017-2022
Per Capita Income	\$ 29,041	\$ 32,975	\$ 3,934	14%
Median Household Income	\$ 57,777	\$ 62,611	\$ 4,834	8%

Source: Esri

Table 8 below shows the change in median income by NSV Locality from 2017 to 2022. Clarke County has the highest median income in the Region at \$73,861, while Page County has the lowest at \$46,337. Over the next five years, growth in median income is expected in each locality with Frederick County anticipating the most growth (13%) and Shenandoah County the least (4%).

Table 8: 2017 - 2022 Median Income by NSV Locality

2017 - 2022 Median Income by NSV Locality						
Variable	Clarke Co.	Frederick Co.	Page Co.	Shenandoah Co.	Warren Co.	Winchester
2017 Median Income	\$ 73,861	\$ 68,102	\$46,337	\$ 51,402	\$60,821	\$ 48,532
2022 Median Income	\$ 80,035	\$ 76,829	\$50,115	\$ 53,700	\$67,087	\$ 51,636
Change 2017-2022	\$ 6,174	\$ 8,727	\$ 3,778	\$ 2,298	\$ 6,266	\$ 3,104
Percent Change 2017-2022	8%	13%	8%	4%	10%	6%

Source: Esri

Figure 2: Share of Households by Income, 2017

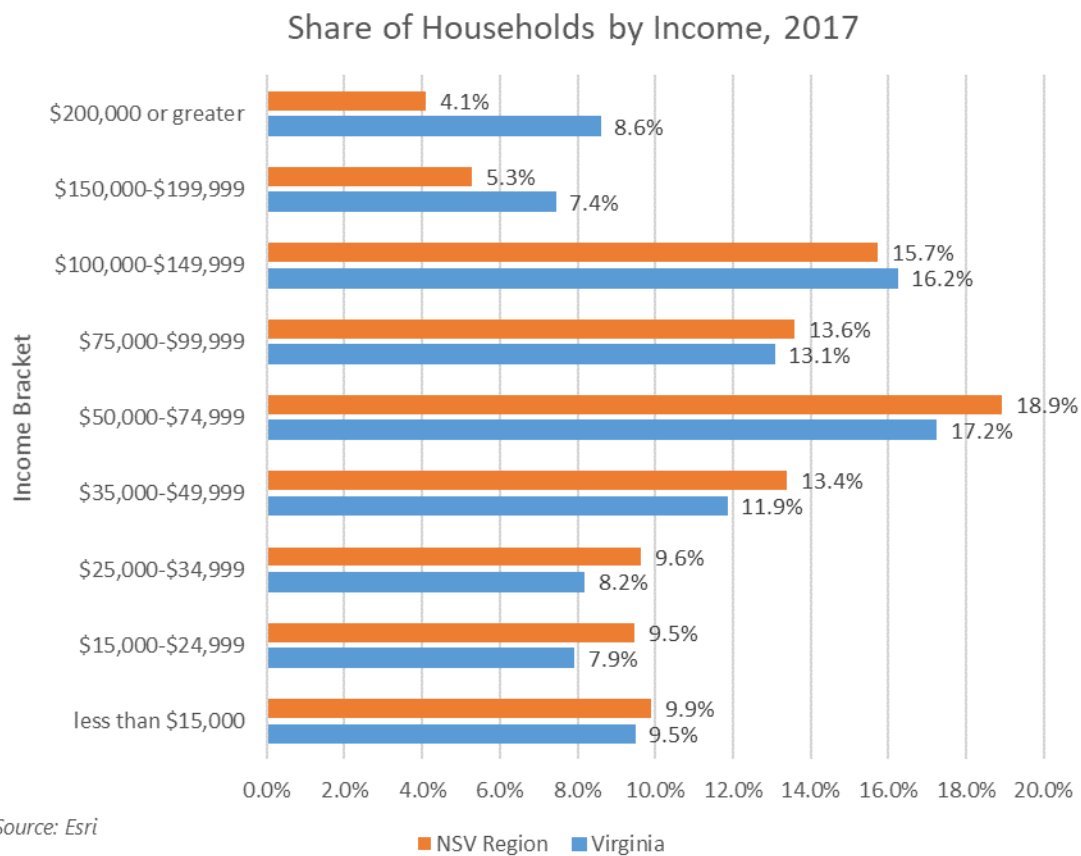


Figure 2 illustrates the share of households by income, comparing the NSV Region to the state. While the state has a higher proportion of those making \$150,000 and higher (16% versus 9.4%) and specifically those making \$200,000 and up (8.6% versus 4.1%). The other income brackets are fairly similar. The NSV Region does have a higher proportion of households making \$34,999 or less (29% in the NSV Region versus 25.6% in the state).

Poverty Rate

As the Region works to increase economic prosperity across the entire region, documenting changes in the poverty rate can help target efforts to alleviate economic conditions that do not allow families to cover the costs of basic living.

The 2017 ALICE (Asset, Limited, Income, Constrained, Employed) Report, presented by the United Way of Virginia, categorizes not only poverty levels, but also challenging economic situations that prevent individuals from achieving economic stability. The ALICE population represents individuals and families who earn more than the Federal Poverty Level, but less than the basic cost of living. These data, seen in, Table 9, show considerably more people in the NSV Region at ALICE levels than at the typical poverty rate. Within Clarke, Frederick, Page, Shenandoah and Warren Counties, nearly a third of all households are income constrained. In Winchester, the proportion of households exceeds a third, with 36% of households considered ALICE. Poverty rates among these counties and city are considerably less than ALICE rates, demonstrating the range of economic situations among families in this region.

Table 9: NSV Region 2015 ALICE and Poverty Households

NSV Region 2015 ALICE and Poverty Households				
	ALICE (% HH)	ALICE (HH)	Poverty (% HH)	Poverty (HH)
Clarke County	29%	1,603	11%	607
Frederick County	28%	8,536	6%	1,829
Page County	30%	2,812	15%	1,406
Shenandoah County	30%	5,129	11%	1,881
Warren County	27%	3,879	10%	1,437
Winchester	36%	3,819	14%	1,486

Source: ALICE Virginia, Study of Financial Hardship, Spring 2017

Note: 2015 Point-in-time Data

Economic Analysis

Employment

The North American Classification Standard (NAICS) are used to identify industries in this analysis. The standard is maintained by the US Census Bureau and is used by Federal statistical agencies in classifying business establishments. Under this standard, industries are organized into 2-digit through 6-digit levels. 2-digit codes show the highest aggregate NAICS code level representing broad categories such as “retail,” whereas 6-digit industry codes present a finer level of detail like “fruit and vegetable markets.” For this analysis, the 2-digit and 4-digit levels are utilized. These levels provide the balance of comprehensiveness and specificity needed to best understand the Region’s employment characteristics.

Overview

As of 2016, there were just under 100,000 jobs within the NSV Region. While this total marginally declined from 2006 to 2016, jobs are expected to grow from 2016 to 2026. From 2016 to 2026 we anticipate an increase of over 9,000 jobs, or 9%. Note that figures in red indicate a decline.

Table 10: NSV Employment Overview

NSV Employment Overview						
2006 Jobs	2016 Jobs	2026 Jobs (Proj.)	2016 - 2016 Change	2016 - 2016 Percent Change	2016 - 2026 Change	2016 - 2026 Percent Change
99,573	99,477	108,800	(96)	(0.1%)	9,323	9%

Source: EMSI

The top employment by 2016 jobs are listed in Table 11 and include Government (14,845), Health Care and Social Assistance (12,922), Manufacturing (12,770), and Retail Trade (12,452). The Accommodation and Food Services industry is the fifth largest sector with just over 8,500 jobs.

Table 11: Top Employment Industries in NSV Region

Top Employment Industries in NSV Region		
NAICS	Description	2016 Jobs
90	Government	14,854
62	Health Care and Social Assistance	12,922
31	Manufacturing	12,770
44	Retail Trade	12,452
72	Accommodation and Food Services	8,581

Source: EMSI

Employment by Industry

Table 12 and Table 13 outline the distribution of industries within the NSV Region at the high-level 2-digit NAICS industry codes. Table 12 takes a historical look from 2006 to 2016 and Table 13 examines industry projections from 2016 to 2026.

From 2006 to 2016, the Construction and Manufacturing industries lost the most jobs (3,331 or 37% and 4,428 or 26% respectively). Retail Trade, Wholesale Trade, and Real Estate Rental and Leasing also lost over 1,000 jobs in total. Conversely, Healthcare and Social Assistance, Government, and Accommodation and Food Services saw the biggest increases, adding just over 6,000 total jobs. Finance and Insurance, Professional Services, and Transportation and Warehousing saw less significant, but still measurable increases in the number of jobs (976, 507, and 499 respectively). The 2016 average earnings per job was \$48,588.³

³ Note that the Average Earnings per job figure includes wages, salaries, supplements (additional employee benefits) and proprietor income.

Table 12: NSV Region 2-Digit NAICS Industries, 2006-2016

NSV Region 2-Digit NAICS Industries, 2006-2016						
NAICS	Description	2006 Jobs	2016 Jobs	2006 - 2016 Change	2006 - 2016 % Change	Avg. Earnings Per Job
11	Crop and Animal Production	1,312	1,256	(56)	(4%)	\$ 28,998
21	Mining, Quarrying, and Oil and Gas Extraction	166	123	(43)	(26%)	\$ 60,349
22	Utilities	112	271	159	142%	\$ 112,204
23	Construction	9,120	5,789	(3,331)	(37%)	\$ 43,399
31	Manufacturing	17,198	12,770	(4,428)	(26%)	\$ 61,986
42	Wholesale Trade	2,486	2,102	(384)	(15%)	\$ 61,558
44	Retail Trade	12,920	12,452	(468)	(4%)	\$ 31,536
48	Transportation and Warehousing	3,924	4,423	499	13%	\$ 51,093
51	Information	1,113	925	(188)	(17%)	\$ 57,710
52	Finance and Insurance	2,242	3,218	976	44%	\$ 63,356
53	Real Estate and Rental and Leasing	1,462	1,154	(308)	(21%)	\$ 43,048
54	Professional, Scientific, and Technical Services	3,238	3,745	507	16%	\$ 63,993
55	Management of Companies and Enterprises	955	1,242	287	30%	\$ 112,891
56	Administrative and Support and Waste Management and Remediation Services	4,260	4,577	317	7%	\$ 33,374
61	Educational Services	2,629	2,705	76	3%	\$ 43,664
62	Health Care and Social Assistance	10,151	12,922	2,771	27%	\$ 57,961
71	Arts, Entertainment, and Recreation	1,388	1,606	218	16%	\$ 21,070
72	Accommodation and Food Services	7,474	8,581	1,107	15%	\$ 18,549
81	Other Services (except Public Administration)	4,731	4,619	(112)	(2%)	\$ 27,264
90	Government	12,690	14,854	2,164	17%	\$ 63,084
99	Unclassified Industry	0	144	144	Insf. Data	\$ 39,714
		99,573	99,477	(96)	(0%)	\$ 48,588

Source: EMSI

From 2016 to 2026, projections indicate a more favorable job atmosphere growing by over 9,300 by 2026. The decline in the Construction and Manufacturing industries is expected to continue, although at a less significant rate than the major decline from 2006 to 2016. Industries with the most significant growth include Healthcare and Social Assistance (growing by 2,077 jobs), Government (growing by 1,600), Finance and Insurance (growing by 1,239), and Professional Services (growing by 1,040).

Table 13: NSV Region 2-Digit NAICS Industries, 2016-2026

NSV Region 2-Digit NAICS Industries, 2016-2026						
NAICS	Description	2016 Jobs	2026 Jobs	2016 - 2026 Change	2016 - 2026 % Change	Avg. Earnings Per Job
11	Crop and Animal Production	1,256	1,246	(10)	(1%)	\$ 28,998
21	Mining, Quarrying, and Oil and Gas Extraction	123	116	(7)	(6%)	\$ 60,349
22	Utilities	271	326	55	20%	\$ 112,204
23	Construction	5,789	5,326	(463)	(8%)	\$ 43,399
31	Manufacturing	12,770	12,552	(218)	(2%)	\$ 61,986
42	Wholesale Trade	2,102	2,358	256	12%	\$ 61,558
44	Retail Trade	12,452	12,890	438	4%	\$ 31,536
48	Transportation and Warehousing	4,423	4,975	552	12%	\$ 51,093
51	Information	925	1,132	207	22%	\$ 57,710
52	Finance and Insurance	3,218	4,457	1,239	39%	\$ 63,356
53	Real Estate and Rental and Leasing	1,154	1,258	104	9%	\$ 43,048
54	Professional, Scientific, and Technical Services	3,745	4,785	1,040	28%	\$ 63,993
55	Management of Companies and Enterprises	1,242	1,578	336	27%	\$ 112,891
56	Administrative and Support and Waste Management and Remediation Services	4,577	5,277	700	15%	\$ 33,374
61	Educational Services	2,705	2,876	171	6%	\$ 43,664
62	Health Care and Social Assistance	12,922	14,999	2,077	16%	\$ 57,961
71	Arts, Entertainment, and Recreation	1,606	1,882	276	17%	\$ 21,070
72	Accommodation and Food Services	8,581	9,150	569	7%	\$ 18,549
81	Other Services (except Public Administration)	4,619	4,903	284	6%	\$ 27,264
90	Government	14,854	16,454	1,600	11%	\$ 63,084
99	Unclassified Industry	144	259	115	80%	\$ 39,714
		99,477	108,800	9,323	9%	\$ 48,588

Source: EMSI

Table 14 indicates historical job growth or decline by locality from 2006 to 2016. This data provided isolates growth or decline by locality and can be helpful when deriving where to implement certain economic development initiatives. However, note that due to the financial recession during this time, these numbers can be considered atypical.

While Winchester lost 5,500 jobs, Frederick County (the county surrounding Winchester) gained 7,719. This likely demonstrates a shifting of jobs, not complete loss of jobs out of the region. Additionally, Clarke County lost 696 jobs, Page County lost 527, Shenandoah County lost 1,207, and Warren County gained 114.

Table 14: Historical Change in Jobs by NSV Region Localities, 2006-2016

Historical Change in Jobs by NSV Region Localities, 2006 - 2016								
NAICS	Industry Description	Clarke County	Frederick County	Page County	Shenandoah County	Warren County	Winchester City	NSV Region
11	Crop and Animal Production	(9)	55	69	(188)	(20)	36	(57)
21	Mining, Quarrying, and Oil and Gas Extraction	(14)	(38)	0	Insf. Data	0	0	(52)
22	Utilities	0	45	Insf. Data	(6)	107	0	146
23	Construction	(224)	(1,177)	(345)	(369)	(636)	(580)	(3,331)
31	Manufacturing	(543)	418	(509)	(1,119)	26	(2,699)	(4,426)
42	Wholesale Trade	36	(228)	(10)	(34)	(46)	(103)	(385)
44	Retail Trade	(46)	1,524	(73)	(187)	118	(1,804)	(468)
48	Transportation and Warehousing	(3)	1,266	24	142	(419)	(511)	499
51	Information	(6)	200	1	(158)	(15)	(210)	(188)
52	Finance and Insurance	(19)	1,355	9	(66)	(47)	(256)	976
53	Real Estate and Rental and Leasing	(14)	(21)	(9)	(66)	(61)	(136)	(307)
54	Professional, Scientific, and Technical Services	122	344	62	13	38	(72)	507
55	Management of Companies and Enterprises	(25)	(143)	Insf. Data	81	(116)	526	323
56	Administrative and Support and Waste Management and Remediation Services	3	427	5	264	220	(602)	317
61	Educational Services	46	75	3	22	94	(164)	76
62	Health Care and Social Assistance	53	1,014	84	427	505	690	2,773
71	Arts, Entertainment, and Recreation	(42)	92	169	65	(14)	(49)	221
72	Accommodation and Food Services	24	900	(51)	(129)	348	15	1,107
81	Other Services (except Public Administration)	(6)	191	6	10	(227)	(85)	(111)
90	Government	(58)	1,384	61	67	236	473	2,163
99	Unclassified Industry	29	39	Insf. Data	17	22	33	140
Total		(696)	7,719	(527)	(1,207)	114	(5,500)	(97)

Source: EMSI

Table 15 examines the top 30 industries by 2016 jobs from the more detailed 4-digit NAICS codes. Also included is the Location Quotient (LQ) for each industry. By examining the Location Quotient (LQ) of an industry we can see how concentrated that industry is within its geographic boundaries. The higher the LQ, the more concentrated an industry is as compared to a larger geographic area. For this analysis we are using the US as our larger geographic area. An LQ of less than 1 typically means an industry is importing from other areas to meet its needs; an LQ equal to or greater than one typically means an industry is meeting its needs internally and may be producing surplus that can be used in other geographic locations. Typically, only values above 1.20 or below 0.80 are considered "significant" findings in LQ analysis, although in this analysis we chose to focus on values over 2.0 to show those most significant industries.

The NSV Region has a high concentration in several industries; those highlighted indicate an LQ over 2.00. These include Plastics Product Manufacturing (8.12), Depository Credit Intermediation (2.18), Warehousing and Storage (3.16), Printing and Related Support Activities (4.75), Gasoline Stations (2.18), and Animal Slaughtering and Processing (3.57). Of those, the industries that had positive job growth between 2006 and 2016 include Depository Credit Intermediation (88% growth), Warehousing and Storage (27% growth), and Animal Slaughtering and Processing (34% growth). Also notable is the Individual and Family Services industry, which grew in employment by 365% (from 413 to 1,922) and has an LQ of 1.28.

Table 15: NSV Region Top 30 Industries by Job 2016 Job Count, 4-Digit NAICS

NSV Region Top 30 Industries by 2016 Job Count, 4-Digit NAICS						
NAICS	Description	2006 Jobs	2016 Jobs	2006 - 2016 Change	2006 - 2016 % Change	2016 Location Quotient
7225	Restaurants and Other Eating Places	5,815	6,878	1,063	18%	1.06
9036	Education and Hospitals (Local Government)	6,141	6,637	496	8%	1.24
6221	General Medical and Surgical Hospitals	4,339	3,919	(420)	(10%)	1.36
9039	Local Government, Excluding Education and Hospitals	3,286	3,434	148	5%	0.97
3261	Plastics Product Manufacturing	3,595	2,894	(701)	(19%)	8.12
9011	Federal Government, Civilian	1,272	2,507	1,235	97%	1.39
5221	Depository Credit Intermediation	1,241	2,327	1,086	88%	2.18
4529	Other General Merchandise Stores	1,980	2,187	207	10%	1.84
5617	Services to Buildings and Dwellings	1,628	1,953	325	20%	1.12
6241	Individual and Family Services	413	1,922	1,509	365%	1.28
6211	Offices of Physicians	1,587	1,886	299	19%	1.16
4451	Grocery Stores	1,556	1,810	254	16%	1.05
4931	Warehousing and Storage	1,416	1,793	377	27%	3.16
5613	Employment Services	1,688	1,713	25	1%	0.76
3231	Printing and Related Support Activities	1,988	1,405	(583)	(29%)	4.75
2382	Building Equipment Contractors	1,774	1,293	(481)	(27%)	0.91
8131	Religious Organizations	1,270	1,291	21	2%	1.19
4471	Gasoline Stations	1,617	1,277	(340)	(21%)	2.18
5511	Management of Companies and Enterprises	955	1,242	287	30%	0.89
7211	Traveler Accommodation	1,321	1,226	(95)	(7%)	1.04
6113	Colleges, Universities, and Professional Schools	1,010	1,218	208	21%	1.00
6111	Elementary and Secondary Schools	1,355	1,176	(179)	(13%)	1.71
3116	Animal Slaughtering and Processing	831	1,112	281	34%	3.57
4841	General Freight Trucking	1,160	1,106	(54)	(5%)	1.47
2389	Other Specialty Trade Contractors	1,615	1,103	(512)	(32%)	1.76
4441	Building Material and Supplies Dealers	1,101	1,043	(58)	(5%)	1.46
4411	Automobile Dealers	954	1,039	85	9%	1.26
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	710	1,016	306	43%	1.81
2361	Residential Building Construction	1,728	1,007	(721)	(42%)	1.39
9026	Education and Hospitals (State Government)	676	977	301	45%	0.52

Source: EMSI

Self-Employment

Self-employment data is analyzed in part to examine the entrepreneurial activity of an area. Self-employment is shown to have positive economic impacts to per capita income and job creation, in addition to reducing poverty levels.⁴ Understanding self-employment patterns across sectors helps a region direct economic development resources as appropriate..

Table 16 and Table 17 examine self-employment between 2006 to 2016, and 2016 to 2026. Following trends in overall job numbers, between 2006 and 2016 the NSV Region lost roughly 1,200 self-employment jobs. However, between 2016 and 2026 an increase of 6,700 jobs is projected. The self-employed industry with the highest LQ from 2006 to 2016 (3.08) and 2016 to 2026 (4.46) is Used Merchandise Stores.

Table 16: NSV Region Top Self-Employed Industries by 2016 Job Count

NSV Region Top Self-Employed Industries by 2016 Job Count						
NAICS	Description	2006 Jobs	2016 Jobs	2006 - 2016 Change	2006 - 2016 % Change	2016 Location Quotient
5617	Services to Buildings and Dwellings	571	556	(15)	(3%)	1.15
2383	Building Finishing Contractors	676	405	(271)	(40%)	1.42
2361	Residential Building Construction	558	367	(191)	(34%)	1.37
2389	Other Specialty Trade Contractors	491	337	(154)	(31%)	1.47
8121	Personal Care Services	259	247	(12)	(5%)	0.67
1110	Crop Production	219	222	3	1%	1.19
2382	Building Equipment Contractors	248	195	(53)	(21%)	1.48
5416	Management, Scientific, and Technical Consulting Services	165	191	26	16%	0.96
8111	Automotive Repair and Maintenance	181	191	10	6%	1.26
6244	Child Day Care Services	312	191	(121)	(39%)	0.82
2381	Foundation, Structure, and Building Exterior Contractors	305	171	(134)	(44%)	1.46
5311	Lessors of Real Estate	151	167	16	11%	1.28
1120	Animal Production and Aquaculture	319	156	(163)	(51%)	1.33
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	97	148	51	53%	1.34
7115	Independent Artists, Writers, and Performers	128	123	(5)	(4%)	0.76
6116	Other Schools and Instruction	86	101	15	17%	0.89
4533	Used Merchandise Stores	47	92	45	96%	3.08
7223	Special Food Services	99	92	(7)	(7%)	1.13
4841	General Freight Trucking	212	89	(123)	(58%)	0.69
	Other Industries	2,752	2,664	(88)	(2%)	
	Total	7,876	6,705	(1,171)	(15%)	

Source: EMSI

⁴ The Economic Impacts of Self-Employment by Stephan J. Goetz, David A. Fleming, and Anil Rupasingha <http://ageconsearch.umn.edu/bitstream/130267/2/jaae443ip3.pdf>

Table 17: NSV Region Top Self-Employed Industries by 2026 Job Count

NSV Region Top Self-Employed Industries by 2026 Job Count						
NAICS	Description	2016 Jobs	2026 Jobs	2016 - 2026 Change	2016 - 2026 % Change	2026 Location Quotient
5617	Services to Buildings and Dwellings	556	549	(7)	(1%)	1.09
2361	Residential Building Construction	367	289	(78)	(21%)	1.13
2383	Building Finishing Contractors	405	286	(119)	(29%)	1.17
2389	Other Specialty Trade Contractors	337	278	(59)	(18%)	1.40
8121	Personal Care Services	247	254	7	3%	0.66
5416	Management, Scientific, and Technical Consulting Services	191	235	44	23%	1.02
1110	Crop Production	222	231	9	4%	1.26
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	148	191	43	29%	1.71
5311	Lessors of Real Estate	167	184	17	10%	1.37
8111	Automotive Repair and Maintenance	191	184	(7)	(4%)	1.23
2382	Building Equipment Contractors	195	164	(31)	(16%)	1.30
2381	Foundation, Structure, and Building Exterior Contractors	171	124	(47)	(27%)	1.22
6244	Child Day Care Services	191	123	(68)	(36%)	0.63
4533	Used Merchandise Stores	92	120	28	30%	4.46
7115	Independent Artists, Writers, and Performers	123	119	(4)	(3%)	0.75
6116	Other Schools and Instruction	101	118	17	17%	0.94
5419	Other Professional, Scientific, and Technical Services	84	115	31	37%	1.00
7223	Special Food Services	92	101	9	10%	1.16
8129	Other Personal Services	78	100	22	28%	1.49
Other Industries		2,747	2,976	229	8%	
Total		6,705	6,741	36	1%	

Source: EMSI

Occupations

The Standard Occupational Classification (SOC) is used to identify occupations in this analysis. The SOC system is a federal statistical standard to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data. All workers are classified into one of 867 detailed occupations according to their occupational definition (SOC 5-digit codes). To facilitate classification, detailed occupations are combined to form 459 broad occupations (4-digit codes), 98 minor groups (3-digit codes), and 23 major groups (2-digit codes).

Among the 2-digit SOC occupation data, several occupations emerge as significant within the NSV Region. The largest occupations are:

- Office and Administrative Support Occupation (14,584 total jobs);
- Transportation and Material Moving Occupations (8,311 total jobs); and,
- Production Operations (8,185 total jobs).

Table 18 includes the occupations top 2-digit SOC occupations, which are expected to grow collectively by about 1,700 over the next five years. The only occupations that are projected to decline over the next five years is the Construction and Extraction Occupations. In 2017 there were 101,758 total jobs in the NSV Region.

Table 18: NSV Region Top Occupations by 2-Digit SOC Codes

NSV Region Top Occupations by 2-Digit SOC Codes					
SOC	Description	2017 Jobs	2017 - 2022 Change	2017 - 2022 % Change	Avg. Hourly Earnings
11-0000	Management Occupations	4,360	316	7%	\$ 45.34
13-0000	Business and Financial Operations Occupations	4,296	539	13%	\$ 34.34
15-0000	Computer and Mathematical Occupations	1,531	255	17%	\$ 38.82
17-0000	Architecture and Engineering Occupations	987	77	8%	\$ 37.84
19-0000	Life, Physical, and Social Science Occupations	500	87	17%	\$ 33.22
21-0000	Community and Social Service Occupations	1,525	175	11%	\$ 21.86
23-0000	Legal Occupations	525	36	7%	\$ 44.74
25-0000	Education, Training, and Library Occupations	6,887	322	5%	\$ 24.70
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	1,226	109	9%	\$ 19.71
29-0000	Healthcare Practitioners and Technical Occupations	5,358	334	6%	\$ 35.01
31-0000	Healthcare Support Occupations	2,967	320	11%	\$ 13.83
33-0000	Protective Service Occupations	1,810	159	9%	\$ 22.15
35-0000	Food Preparation and Serving Related Occupations	8,623	438	5%	\$ 11.14
37-0000	Building and Grounds Cleaning and Maintenance Occupations	4,179	302	7%	\$ 12.54
39-0000	Personal Care and Service Occupations	4,647	545	12%	\$ 11.43
41-0000	Sales and Related Occupations	10,471	391	4%	\$ 16.59
43-0000	Office and Administrative Support Occupations	14,584	1,116	8%	\$ 17.22
45-0000	Farming, Fishing, and Forestry Occupations	688	34	5%	\$ 13.42
47-0000	Construction and Extraction Occupations	4,743	(112)	(2%)	\$ 18.37
49-0000	Installation, Maintenance, and Repair Occupations	4,608	272	6%	\$ 20.65
51-0000	Production Occupations	8,185	155	2%	\$ 17.99
53-0000	Transportation and Material Moving Occupations	8,311	522	6%	\$ 17.00
55-0000	Military occupations	748	32	4%	\$ 21.72
99-0000	Unclassified Occupation	0	0	0%	\$ -
Total		101,758	6,426	6%	\$ 20.62

Source: EMSI

Table 19 shows the top 30 occupations by 5-digit SOC code within the NSV Region. There are no clear leaders in this table, indicating a diverse occupational distribution, but many of the top occupations make less than \$15 per hour and generally do not need more than a high school education to enter into the field. The largest growth among these occupations is the Personal Care Aide occupation, growing by 374 jobs (21%) in the next five years. There is also moderate growth among the Customer Service Representatives (186 jobs or 9%), Janitors and Cleaners (177 or 10%), Secretaries and Administrative Assistants (158 or 11%), Office Clerks (156 or 8%), and Heavy and Tractor-Trailer Truck Drivers (159 or 8%). The only occupation among the top 30 to decline over the next five years is the Carpentry trade, which is consistent with industry findings.

Table 19: NSV Region Top 30 Occupations by 5-Digit SOC Codes

NSV Region Top 30 Occupations by 5-Digit SOC Codes, 2017 - 2022							
SOC	Description	2017 Jobs	2022 Jobs	2017 - 2022 Change	2017 - 2022 % Change	Avg. Hourly Earnings	Annual Openings
41-2011	Cashiers	3,341	3,341	0	0%	\$ 9.33	652
41-2031	Retail Salespersons	2,902	3,025	123	4%	\$ 13.39	456
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	2,454	2,519	65	3%	\$ 9.50	472
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	2,349	2,491	142	6%	\$ 13.36	368
43-4051	Customer Service Representatives	2,094	2,280	186	9%	\$ 18.09	314
43-9061	Office Clerks, General	2,049	2,205	156	8%	\$ 14.58	279
35-3031	Waiters and Waitresses	1,939	2,047	108	6%	\$ 11.71	395
53-3032	Heavy and Tractor-Trailer Truck Drivers	1,925	2,084	159	8%	\$ 20.15	248
43-5081	Stock Clerks and Order Fillers	1,862	1,925	63	3%	\$ 12.73	260
39-9021	Personal Care Aides	1,815	2,189	374	21%	\$ 9.53	355
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,794	1,971	177	10%	\$ 13.20	277
29-1141	Registered Nurses	1,736	1,792	56	3%	\$ 27.20	99
31-1014	Nursing Assistants	1,446	1,519	73	5%	\$ 12.10	183
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,426	1,584	158	11%	\$ 16.00	192
41-1011	First-Line Supervisors of Retail Sales Workers	1,217	1,253	36	3%	\$ 20.62	141
49-9071	Maintenance and Repair Workers, General	1,127	1,200	73	6%	\$ 16.89	127
43-3031	Bookkeeping, Accounting, and Auditing Clerks	1,122	1,151	29	3%	\$ 19.25	135
11-1021	General and Operations Managers	1,095	1,196	101	9%	\$ 54.46	112
25-2021	Elementary School Teachers, Except Special Education	1,085	1,114	29	3%	\$ 28.77	87
43-1011	First-Line Supervisors of Office and Administrative Support Workers	1,069	1,179	110	10%	\$ 26.23	131
37-3011	Landscaping and Groundskeeping Workers	1,068	1,136	68	6%	\$ 12.62	149
25-9041	Teacher Assistants	995	1,037	42	4%	\$ 13.58	114
37-2012	Maids and Housekeeping Cleaners	977	1,016	39	4%	\$ 9.81	141
25-3098	Substitute Teachers	923	942	19	2%	\$ 14.01	107
47-2061	Construction Laborers	919	926	7	1%	\$ 14.09	100
35-2014	Cooks, Restaurant	895	991	96	11%	\$ 11.14	150
47-2031	Carpenters	845	807	(38)	(4%)	\$ 17.51	78
25-2031	Secondary School Teachers, Except Special and Career/Technical Education	839	855	16	2%	\$ 29.85	65
43-4171	Receptionists and Information Clerks	818	874	56	7%	\$ 13.81	121
25-1099	Postsecondary Teachers	805	907	102	13%	\$ 36.58	84

Source: EMSI

Labor Force Participation & Unemployment

A healthy economy must take into account both labor force participation rate and unemployment rate to identify workforce trends. The labor force are those people 16 years of age and older who are actively looking for work or are employed. Among the localities, there is a ten-point range in the labor force participation rate. Frederick County has the highest participation rate at 68%, while Page County has the lowest, at 58.9%.

Unemployment rates for the NSV Region range from a low of 4.8% in Clarke County to a high of 8.6% in Page County. Warren County is the next highest at 6.5% and the remaining localities are around 5% unemployment. See Table 20 for the 2016 labor force breakdown by locality.

Table 20: NSV Region 2016 Labor Force Breakdown

NSV Region 2016 Labor Force Breakdown by Localities			
Locality	Population 16 Years and Over	Labor Force Participation Rate*	Unemployment Rate
Clarke Co.	11,737	63.0%	4.8%
Frederick Co.	65,211	68.0%	5.1%
Page Co.	19,608	58.9%	8.6%
Shenandoah Co.	35,040	61.4%	5.5%
Warren Co.	31,023	64.2%	6.5%
Winchester	21,767	62.3%	5.1%

Source: American Community Survey, 2016

*The labor force participation rate is the labor force as a percent of the civilian noninstitutional population. Persons who are neither employed nor unemployed are not in the labor force. This category includes retired persons, students, those taking care of children or other family members, and others who are neither working nor seeking work.

Table 21 indicates the number of unemployed people by occupation and the percent of total unemployed people that are represented in both the region and the US. Those in Production Occupations and Office and Administrative Support Positions represent the highest percent of regional unemployment (14.6% and 13.7% respectively).

Table 21: NSV Region Unemployment by Occupations, 2017

NSV Region Unemployment by Occupations, 2017				
SOC	Occupation	Unemployed*	% of Regional Unemployment	% of National Unemployment
51-0000	Production Occupations	599	14.6%	8.2%
43-0000	Office and Administrative Support Occupations	562	13.7%	11.8%
99-0000	No Previous Work Experience/Unspecified	408	9.9%	12.5%
11-0000	Management Occupations	375	9.1%	8.8%
53-0000	Transportation and Material Moving Occupations	323	7.9%	5.9%
41-0000	Sales and Related Occupations	287	7.0%	7.4%
47-0000	Construction and Extraction Occupations	276	6.7%	9.9%
49-0000	Installation, Maintenance, and Repair Occupations	174	4.2%	3.6%
35-0000	Food Preparation and Serving Related Occupations	167	4.1%	5.3%
13-0000	Business and Financial Operations Occupations	138	3.4%	4.1%
31-0000	Healthcare Support Occupations	134	3.3%	2.9%
37-0000	Building and Grounds Cleaning and Maintenance Occupations	116	2.8%	3.6%
25-0000	Education, Training, and Library Occupations	95	2.3%	2.1%
39-0000	Personal Care and Service Occupations	92	2.2%	2.1%
29-0000	Healthcare Practitioners and Technical Occupations	63	1.5%	1.8%
15-0000	Computer and Mathematical Occupations	60	1.5%	2.0%
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	58	1.4%	1.5%
33-0000	Protective Service Occupations	38	0.9%	1.3%
17-0000	Architecture and Engineering Occupations	36	0.9%	1.3%
21-0000	Community and Social Service Occupations	33	0.8%	1.1%
45-0000	Farming, Fishing, and Forestry Occupations	27	0.7%	1.6%
23-0000	Legal Occupations	18	0.4%	0.5%
19-0000	Life, Physical, and Social Science Occupations	17	0.4%	0.6%
55-0000	Military occupations	7	0.2%	0.2%

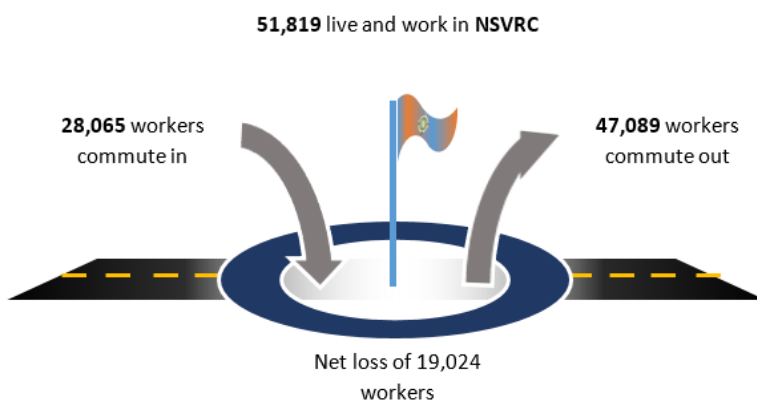
Source: EMSI

*As of 11/2017 estimates.

Commuting Patterns

The NSV Region has 28,065 workers who commute in from outside of the area to work, while 47,089 workers who live in the area commute elsewhere for work. Additionally, 51,819 workers both live and work in the area. This results in a net loss of 19,024 workers from the NSV Region. The top localities where workers are employed are Winchester, VA (16,322); Frederick County, VA (13,115); Fairfax County, VA (8,784); Shenandoah County, VA (8,773); and Warren County, VA (7,892).

Figure 3: Commuting Patterns for NSV Region



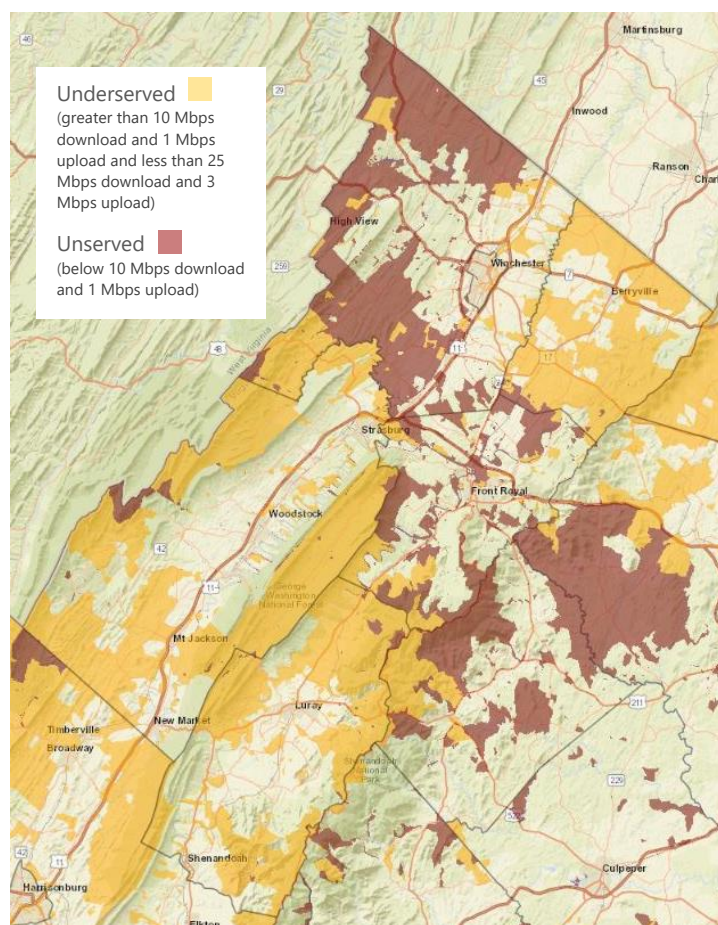
Source: US Census on the Map, 2014

Broadband

While 94% of the NSV Region is covered by broadband⁵, there are some tangible speed issues present in certain geographies. Figure 4 shows the areas that are underserved and unserved by broadband within the NSV Region. All localities in the NSV are affected with limited access, and this can impede economic development efforts as well as response and recovery to natural disasters.

Specifically, this map indicates Frederick County and Warren County have the most unserved areas—those places with below 10 Mbps download and 1 Mbps upload speed. The remaining localities all have portions that are underserved by broadband. When considering access to information, means of communication, and ways to reach out to potential markets, having adequate broadband is key.

Figure 4: Underserved and Unserved Broadband Areas of the NSV Region



Source: Center for Geospatial Information Technology

⁵ NSV Broadband Map (see Appendix A)

Appendix B: Economic Resilience and Industry Cluster Identification

Ensuring business diversification is crucial to maintaining economic resiliency. The NSV Region is well positioned with a diverse base of businesses to absorb the shock of an industrywide or nationwide impact. However, there are challenges that have been addressed from previous planning efforts, outlined below. The NSV Region is taking appropriate steps to meet these challenges with action and preparing for the future.

Major Risks

In its 2016 Regional Economic Development Plan, the NSV Region identified several challenges. These include: skill gaps in workforce development; silo mentality within the Region's sectors; cost of living and lack of affordable housing; threats to natural resources; lack of amenities for young adults and families; instability of personal finances; and resistance to change. As found in the Economic Conditions Data Report, these community-identified challenges are supported by demographic and economic data of the Region. Many of the top occupations have average wages less than \$15 per hour, only 25% of those 25 and older have a bachelor's degree, and 29% of NSV households make less than \$35,000 per year.

Preparedness

There exists a diverse mix of public and private sector employers which has led the NSV Region to maintain resiliency in times of economic downturn. The NSV Region worked to identify emerging clusters and conducted a complete industry analysis. In its 2016 Regional Economic Development Plan, they identified three industry clusters to develop: Agribusiness, Business Foundations, and Tourism. These clusters build off existing efforts and synergize with the region's assets and uniqueness.⁶ The development of these clusters will create a more robust economy able to withstand the pressures of an economic downturn, due to natural disaster or national economic woes. Within each of the three clusters, the plan outlines goals and an action plan to actualize development.

Future Work

Within the Regional Economic Development Plan, the NSVRC created a plan of action for each cluster identified. These plans, in matrix form, outline the future work of the NSV Region. These actions include addressing the Region's major risks by increasing the profitability of certain sectors, expanding workforce development opportunities, support existing businesses through training and network building, and establishing branding and marketing efforts.

Industry Cluster Identification

An analysis was performed to identify which industry clusters demonstrate the greatest potential for generating economic activity in the NSV Region. There are overlaps with many of the clusters identified in the 2016 Regional Economic Development Plan. Industry clusters are groups of industries that are linked to common products, labor pools, technologies, supply chains, and/or training needs. Identifying clusters is crucial in long-term economic development planning, as benefits to one industry will generally impact other industries within the same cluster. The clusters below are identified by the following characteristics: earnings potential, growth, regional competitiveness, regional specialization, and gross regional product.

⁶ Stronger Economies Together 2016 Regional Economic Development Plan
http://users.neo.registeredsite.com/5/4/9/18967945/assets/NSV_Region_SET_Plan_November_2016_sansWM.pdf

NSV Region Clusters

For the NSV Region, we identified four industry groupings for potential cluster development:

Business Services

Of the top industry clusters, this is by far the most diverse representing 18 industries (at the 6-digit NAICS code level). Top industries include Corporate, Subsidiary, and Regional Managing Offices (1,321 jobs); Engineering Services (374 jobs); Computer Systems Design Services (318 jobs); Administrative and General Management Consulting Services (298 jobs); and Custom Computer Programming Services (222 jobs). For these top five industries, average earnings are \$85,464. The total number of jobs in this cluster is 3,140. Examples of employers in this cluster include Eagle Financial Services Inc in Berryville; First Financial Corp in Strasburg; and Pioneer Bankshares Inc in Stanley.

Local Financial Services

A cluster that provides local financial services can complement any existing business. Top industries include Credit Unions (1,495 jobs), Commercial Banking (807 jobs) and Insurance Agencies and Brokerages (401 jobs). This cluster has a total of 2,793 jobs; average earnings for this cluster is \$46,007. Examples of employers in this industry cluster include the Front Royal Federal Credit Union, Partners First Federal Credit Union, and Apple Federal Credit Union.

Food Processing and Manufacturing

Like the identified Agribusiness cluster in the 2016 Regional Economic Development Plan, the Food Processing and Manufacturing cluster builds off the agricultural heritage of the region, and aims to modernize it to meet market demand today. This industry cluster represents 12 individual industries showing diversity within the cluster. Top industries include Fluid Milk Manufacturing (594 jobs); Fruit and Vegetable Canning (580 jobs); Miscellaneous Food Manufacturing (298 jobs); and Cookie and Cracker Manufacturing (260 jobs). For these top industries, average earnings are \$67,596. The total jobs in this cluster is 2,713. An example of employers includes, Garber Ice Cream Co, Shawnee Canning Co, and Stroehmann Bakeries LLC.

Plastics

While not an identified cluster in the 2016 Regional Economic Development Plan, the employment in this industry could complement both the Food Processing and Manufacturing/Agribusiness cluster and Business Services sector via supply chains or complementary services. This industry contains 2,881 jobs and average earnings for this cluster is \$84,359. The top industry in this cluster is All Other Plastics Product Manufacturing with 1,595 jobs. The top employer in this industry is Rubbermaid Commercial Products in Winchester (about 1,300 jobs).

Additional Clusters

Three additional clusters, Education and Knowledge Creation, Federal Government Service, and Local Government, were deemed significant through the analysis (employing 3,392, 3,338 and 3,593 workers respectively). While additional jobs in the public sector can help facilitate economic activity, growth in the private sector has the most potential to increase economic growth. Therefore, we recommend investing in those clusters that show the most potential for private sector growth.

Industry Market Overview

From the Colliers International Research and Forecast Report, Table 22 shows the existing and newest supply of industrial space. As the region moves to develop and attract clusters that it is uniquely suited to, having ready-to-accommodate industrial space will be helpful to draw new business. Table 22 indicates that Frederick County has the largest inventory of existing space, with another 581,000 square feet under construction, which will help expand offerings in the market that currently has a 1% vacancy rate. Rent per square foot (Triple Net) ranges from \$4.96/SF in Frederick County to \$3.50 in Page County. To entice prospective businesses with a range of product, the industrial market should have a healthy vacancy rate. Warren County shows no vacant space but is currently adding 100,000 SF to their market. Winchester, Shenandoah and Page Counties demonstrate vacancy rates that allow for flexibility in the market.

Table 22: Square Feet of Industrial Space in the NSV Region

Industrial Space Overview in the NSV Region						
	Existing Inventory	New Supply (10/17-03/18)	Under Construction	Absorption (10/17-03/18)	Vacancy Rate	Direct Asking Rate (per SF)
Frederick County	11,816,021	1,000,000	581,000	1,084,306	1%	\$ 4.96
Page County	488,872	-	-	-	23%	\$ 3.50
Shenandoah County	2,232,641	-	-	-	11%	\$ 3.80
Warren County	3,517,647	-	100,000	-	0%	n/a
Winchester	3,053,621	-	-	(36,000)	8%	\$ 4.92

Source: Colliers International Research and Forecast Report, Shenandoah Valley, Industrial Market, First Quarter 2018 and Fourth Quarter 2017

*Information for Clarke County unavailable

Appendix C: SWOT Analysis

A SWOT analysis is a snapshot in time of a region's unique assets; it looks at the **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats of a region. It looks both internally within the region and externally outside of the region to help position exactly how to leverage assets and address shortcomings. The purpose of conducting a SWOT analysis as part of the CEDS process is twofold: it provides a benchmark to look back on to measure progress, and it provides direction moving forward. In other words, it helps provide a comprehensive understanding of a region's current capacity which can then help to prioritize next best actions. The following are examined when conducting a SWOT:

- State of the regional economy
- Regional clusters
- External trends and forces
- Workforce considerations
- Spatial efficiencies/sustainability
- Broadband needs
- Energy needs
- Natural hazards
- Equitable development
- Partners for economic development
- Resources for economic development

As the NSVRC moves forward, this SWOT analysis will serve as the basis for a strategic direction through an Action Plan. The Action Plan will be consistent with plans and efforts previously underway by the NSVRC and previous sections of this CEDS document.

In 2016 the NSVRC prepared a Regional Economic Development Plan and conducted part of a SWOT analysis. Strengths, opportunities, and challenges were examined, and this SWOT will lean on this information. In addition, the information in this SWOT is supplemented by data in the background conditions section of this report, as well as pertinent regional and national trends. A bullet point with a * next to it indicates that the information was drawn from a previous report but deemed still relevant by the CEDS Project Team.

Note | SWOT Definitions from CEDS Guidelines

Strengths are a region's relative competitive advantages (e.g. industry supply chains and clusters, extensive port, rail, and broadband assets, specialized workforce skills, higher education, collaboration among stakeholders) and often internal in nature;

Weaknesses are a region's relative disadvantages (e.g. risk-averse or change resistant regional culture), also often are internal in nature;

Opportunities are chances or occasions for regional improvement or progress (e.g., expansion of a biosciences research lab in the region), often external in nature;

Threats are changes or occasions for negative impacts on the region or regional decline (e.g. several companies in the area considering moving to lower-cost areas of the state), also often external in nature.

**Bullet points that have a star indicate that characteristics are derived from a previous plan.*

Strengths	Weaknesses
■ Diverse business mix. * ■ Rich natural, recreational and historic assets. * ■ Strong production and revenue generation in the agricultural sector. * ■ Population is expected to increase by 4% by 2022. ■ Median household income is projected to increase by 2022 to \$62,611(8% or roughly \$4,800). ■ From 2016 to 2026 there is an anticipated increase of 9,000 jobs (overall 9% growth in employment). ■ Diverse mix of educational institutions that provide technical training certificates, Associate's degrees, Bachelor degrees, Master's Degrees, workforce training. Offerings continue to grow as workforce changes. ■ Multiple iterations of long-term plans are in place to mitigate natural hazard events. ■ Regional transportation routes that cut across the valley, including I-81, I-66, in addition to the Virginia Inland Port in Front Royal, are major economic drivers. ■ Three airports within a 2-hour drive. ■ Healthcare and Social Assistance, Government, and Accommodation and Food Services saw the biggest employment increases adding just over 6,000 jobs total. ■ Collaborative workforce initiative throughout Frederick and Clarke Counties, and the City of Winchester, includes business, education, government, and non-profit representatives. ■ Availability of credentialing programs through Workforce Solutions. ■ The center of the region sits 68 miles west from the center of Washington DC and 110 miles from the center of Richmond.	■ Skill gap between available labor force and available jobs. * ■ Silo mentality is improving, but still exists within some of the region's sectors. * ■ Cost of living and lack of affordable housing.* ■ Environmental and man-made threats to natural resources. * ■ Lack of amenities for young adults and families. * ■ Southern localities are not included in the workforce initiatives in the northern part of the NSV region. ■ Availability and affordability of quality child care options. ■ Rail/ port facilities are import heavy. ■ Low enrollment in LFCC credentialing programs specific to employer needs (i.e. MT1). ■ High incidence of out commuting. ■ Uneven broadband coverage across the region. ■ Lack of shovel ready sites for development prospects. ■ Low vacancy rates, lack of move in ready space for business. ■ The Construction and Manufacturing industries are losing jobs. Retail Trade, Wholesale Trade, and Real Estate Rental and Leasing also lost a significant number of jobs, over 1,000 in total between 2006 and 2016.

Opportunities	Threats
■ Expand workforce training through regional collaborations including technical schools, certification program, and collaboration between schools. * ■ Invest in entrepreneurial/Small Business Development opportunities. * ■ Marketing intra-regional supply of products and services. * ■ Regional initiatives to support renewable energy businesses.* ■ Public engagement through community development efforts. * ■ Collaboration with the GO Virginia Region 8 Partners. ■ Increased capacity on major routes including I-81, I-66, and the Virginia Inland Port. ■ Redevelopment of underutilized properties. ■ Retaining workers from the region who commute out for employment. ■ Harnessing agricultural roots and promoting locally grown produce in popular local food movement. ■ Preparing the regional workforce to fill positions that will be required for elder care as the population continues to age. ■ Capitalize on the Shenandoah Valley Tourism Partnership's "Today's Shenandoah Valley" campaign. ■ Expand on agri-tourism and recreation assets. ■ Improve available sites through the Commonwealth's Site Readiness Program. ■ Develop stronger broadband availability to unserved and underserved portions of the NSV Region to expand business development opportunities and quality of life for residents. ■ Relatively high unemployment rate in Page County means people are looking for work and could be directed to jobs available in the northern part of the NSV region, where many new jobs are expected. ■ Assess and address barriers to enrollment in LFCC Workforce Solutions programs. ■ Expansion or addition of local transit systems to ensure service to entire NSV region.	■ For every 10 new jobs, seven will require a certification or two-year degree. The region needs to ensure that the workforce has access to a range of training to meet employer demand. * ■ Ability of the NSV to attract high-wage jobs. * ■ An increasing amount of materials and services to support the agricultural industry are produced outside the NSV region. * ■ Continued loss of workers to locations outside the region – especially out commuting to Northern Virginia. ■ The number of retiring workers and how the region will adequately keep up with new workforce demand, in addition to replacement demand. ■ Technological changes that demand new skills not currently being taught. ■ High-risk environmental hazards include flooding, winter storms, hurricanes, and tornadoes. ■ Increased usage of major transportation routes like I-81 mean that upkeep and necessary repairs are vital to ensuring adequate flow of goods and passengers. ■ Aging infrastructure – especially in terms of water and sewer systems. Poor infrastructure could hinder development potential across the NSV. ■ Brain drain – college and university graduates leaving the region after they have completed their degree. ■ Substance abuse a growing issue that affects families, workforce and overall quality of life. ■ Business location and expansion in surrounding areas that require skills found in our region will put increased pressure on availability of labor. ■ Shifting dynamics in demographics will affect labor force participation and have implications on workforce availability throughout the region.

Appendix D: Strategic Direction/Action Plan & Action Plan Matrix

From examining the current and trending economic conditions of the area, and conducting an in-depth SWOT analysis, themes on how to increase the region's economic resiliency have emerged. These themes have been formulated into goals with specific objectives and supporting performance metrics. Goals encompass workforce, business, and site development; natural hazard mitigation efforts; and the region's tourism potential. While there is diversity within the NSV Region, and some of these goals may apply more specifically to one locality over another, they all aim to achieve the following vision:

The Northern Shenandoah Valley is a place where residents are meaningfully employed, beautiful natural resources are readily accessible, and a supportive business environment creates opportunity for residents and newcomers alike.

The following draft action goals will be incorporated into the Action Plan Matrix, which is the guiding document to move implementation of this CEDS plan. In addition to goals, objectives, and supporting performance measures, the Action Plan Matrix will also identify the lead stakeholder for each task, priority level, timeframe, cost estimate, and possible funding sources. Identifying these components across all objectives and tasks will create a foundation from which to spring forward into implementation.

Goals

Goal 1 | *Expand workforce opportunities and address training gaps by increasing partnerships across the Northern Shenandoah Valley region.*

Goal 1 Objectives and Tasks

- 1.1 Understand capacity of service providers in the Northern Shenandoah Valley Region and measure the effectiveness of their programs.
 - 1.1.1 Coordinate with workforce partners to create an interview or survey to identify what programs are currently offered related to in demand occupations, and the level of enrollment.
 - 1.1.2 Partner with school divisions to evaluate existing Work-Based Learning (WBL) programs. Expand WBL programs and business partnerships.
 - 1.1.3 Conduct "before and after" surveys of program participants to track results that can be used as performance metrics for workforce organizations and the NSVRC.
- 1.2 Continue ongoing monitoring of workforce needs.
 - 1.2.1 Collect local business retention program outputs as they relate to workforce demands.
 - 1.2.2 Annually review the industry employment needs projected out 10 years to detect any needs not currently being met by the service providers.
 - 1.2.3 Analyze results of the data collection in 1.2.1 and 1.2.2 using visuals and graphics. Present findings to a joint meeting of the local EDAs.
- 1.3 Enhance regional collaboration as it relates to developing a sustainable workforce.
 - 1.3.1 Build on collaborative efforts of the regional workforce partners and provide support through partnership, collaboration, and communication with non-profits, government, public schools, universities and colleges, and businesses.

- 1.3.2 Support workforce development by facilitating the growth of new relationships and expanding existing partnerships between localities, businesses, and service providers.
- 1.3.3 Build off GO Virginia initiative to create a regional private/public training loan pool to offer a resource for individuals who want to upskill. Collaborate with Region 8 GO Virginia Council to establish training loan pool for the next year's budget.
- 1.4 Increase awareness of workforce opportunities by promoting regional career pathways.
 - 1.4.1 Collaborate with workforce stakeholders to create a specific marketing campaign that presents all options post high school.
 - 1.4.2 Build up the region's "talent" brand and market to target industries.
 - 1.4.3 Utilize social media outlets to spread the word of workforce stakeholders' programs and highlight success stories.
 - 1.4.4 Continue educating employers, labor force on career pathways by demonstrating examples and publishing success stories.
 - 1.4.5 Promote collaboration between schools and employers focusing on work-based learning programs.
 - 1.4.6 Collect email addresses and contact information at every meeting or event to expand the regional network.
- 1.5 Identify, evaluate, and reduce barriers to training and employment in the Northern Shenandoah Valley. The following list includes well-known barriers or employment challenges that will be addressed by NSVRC and their partners through this CEDS.
 - 1.5.1 Homelessness
 - 1.5.2 Criminal Background
 - 1.5.3 Substance abuse
 - 1.5.4 Access to child care
 - 1.5.5 Access to transportation
 - 1.5.6 English language learner
 - 1.5.7 Financial literacy and education
 - 1.5.8 Physical, mental or learning disabilities

Goal 2 | *By supporting regional and local efforts, help highlight the region's natural amenities and quality of life to boost the tourism industry, preserve natural resources, and draw new residents.*

Goal 2 Objectives and Tasks

- 2.1 Support the Shenandoah Valley Tourism Partnership and the Shenandoah Valley Tourism Association as they work to strengthen activities that brand and promote the region.
 - 2.1.1 Promote opportunities for current and potential tourism-based business representatives to share information through networking events, trainings and workshops, or mentorship programs.
 - 2.1.2 Help to promote established brands through social media channels and adding links to Valley tourism organizations to the NSVRC website.
 - 2.1.3 Encourage local businesses to increase awareness of brand through adding their logo(s) to their website and social media platforms.
 - 2.1.4 Establish taskforce subcommittee responsible for revitalizing the outdoor asset map for the whole valley (NSVRC & CSPDC).

- 2.2 Partner with localities and tourism agencies to increase transportation options surrounding recreational and natural assets.
 - 2.2.1 Identify roadway segments appropriate for retrofit with bike lanes; work with VDOT to implement.
 - 2.2.2 Designate US Bike Route 11 through the region.
 - 2.2.3 Work with the state, National Park, bike clubs, tour operators, and localities to educate motorists and bicyclists on sharing the road.
 - 2.2.4 Continue work with localities to develop additional transportation ideas like shuttles, ride sharing, or trolleys between the most visited recreational sites.
- 2.3 Develop recreational trails.
 - 2.3.1 Inventory all existing Blueways, Hiking, Mountain Biking, Horse, and OHV trails.
 - 2.3.2 Identify potential Blueways, Hiking, Mountain Biking, Horse, and OHV trails.
 - 2.3.3 Prioritize elements of trail development for each category: Blueways, Hiking, Mountain Biking, Horse, and OHV trails
 - 2.3.4 Identify Rails to Trails opportunities in each locality.

Goal 3 | *Support efforts to retain and expand existing businesses to increase profitability and community vitality. Target those that are economically supported by the region's unique assets.*

Goal 3 Objectives and Tasks

- 3.1 Work with localities in the Northern Shenandoah Valley to strengthen the Agribusiness industry, support farmers, and cultivate programs to expand the industry's output and geographic reach.
 - 3.1.1 Establish a "Northern Shenandoah Valley Regional Agricultural Development Council" to guide the business support efforts as well as retention and expansion activities directly related to agribusiness.
 - 3.1.2 Establish a regional agribusiness brokerage, as a physical and virtual presence.
 - 3.1.3 Highlight the region's agricultural roots and promote locally grown produce through a coordinated marketing effort. Expand message beyond the Northern Shenandoah Valley region to metros in close proximity.
 - 3.1.4 Hold roundtable discussion with local farmers to determine which products are the most in need of processing for regional distribution.
 - 3.1.5 Identify a strategy to increase regional food processing capacity for crops and livestock.
 - 3.1.6 Determine three potential parcel(s) for a processing/distribution plant and establish conversations with localities about possibility of attracting development.
- 3.2 Partner with and support those localities in the Northern Shenandoah Valley who are working to retain and expand existing businesses and attract new businesses.
 - 3.2.1 Ensure each locality has identified target industry clusters and has a local economic development strategic plan in place that aligns with their comprehensive plan.
 - 3.2.2 Develop a comprehensive list of funding sources for new and existing businesses to leverage as they expand.
 - 3.2.3 For small businesses looking to scale up, work with the Small Business Development Center to provide resources and a path from sole proprietor to hiring employees.

- 3.2.4 Assist localities with identifying all "zones" and leveraging the maximum benefits of each within their community.
- 3.3 Strengthen and promote the role of the NSVRC as a regional resource hub for localities and their economic development and planning departments.
 - 3.3.1 Facilitate a quarterly meeting or conference call with representatives from the economic development and planning departments of all member-localities. Establish agenda and benchmarks for each call.
 - 3.3.2 Continue to support the Region 8 GO Virginia Economic Development Ad Hoc Group as they advise the Region 8 Council. Utilize this group as the Regional Economic Development Advisory Committee.
 - 3.3.3 Ensure the economic development official from each member-locality is either part of this committee or on the quarterly call. Benchmark their progress and how they are administering their own efforts.
- 3.4 Partner with government, public schools, universities and colleges, and businesses to become an entrepreneurial region of innovative ideas and technologies capable of fulfilling future market demands. Support the development of an incubator space and entrepreneurship programming in the region.
 - 3.4.1 Support the development of an incubator space and entrepreneurship programming in the region.
 - 3.4.2 Support the creation of support networks for new startups, including mentorships that connect entrepreneurs with established business owners.
 - 3.4.3 Involve local businesses and community leaders in mentoring area university students in business and entrepreneurship.

Goal 4 | *Work with partners across the Northern Shenandoah Valley Region to increase site readiness through upgrades to broadband services, utilities and other physical infrastructure.*

Goal 4 Objectives and Tasks

- 4.1 Ensure there is a regional inventory of sites available to suit target industry clusters with <18 months to market.
 - 4.1.1 All sites that are available for sale or lease are identified with full data on Virginia Scan.
 - 4.1.2 Expand on current site characterization efforts to include completion of due diligence work at a minimum (Tier 3 Characterization).
 - 4.1.3 Identify best use scenarios for high priority sites to market.
- 4.2 Continue to discuss region-wide infrastructure needs and track ongoing projects with localities.
 - 4.2.1 Discuss issues of aging infrastructure, and prioritize capital improvements, on quarterly calls with regional economic development and planning departments.
 - 4.2.2 Track the progress of, and continue to contribute to, the I-81 improvement effort.
 - 4.2.3 Establish councils of related utility providers to advise and support local planners and EDOs.
 - 4.2.4 Support ongoing state and local efforts to expand broadband coverage and increase speed of broadband.

Goal 5 | *Develop and implement programs to increase the awareness of natural hazard mitigation efforts that target the public and local governments.*⁷

Goal 5 Objectives and Tasks

- 5.1 Offer hazard mitigation and disaster preparedness training to educate the public and localities about the dangers of natural hazards.
 - 5.1.1 Develop list of locations where trainings could take place, existing events to present at, and/or online training programs.
 - 5.1.2 Present hazard mitigation tactics to localities at their regular meetings.
 - 5.1.3 Draft MOUs, policies, or resolution language that, once implemented, incorporate mitigation planning into the framework of local government planning in the NSV Region.
 - 5.1.4 Work with localities to identify and prioritize a list of cost-effective structural projects to reduce the impact of hazards.
- 5.2 Use data to help show current efforts and existing needs in hazard mitigation efforts.
 - 5.2.1 Update data as necessary for localities and public outreach.
 - 5.2.2 Create easy-to-understand maps and graphics specific to supplement findings of Hazard Mitigation Plan.
- 5.3 Rectify the pollution of the Shenandoah River and Chesapeake Bay Watershed from Agricultural byproducts and runoff.
 - 5.3.1 Support and help coordinate implementation of the Chesapeake Bay Phase III Watershed Implementation Plan's recommendations affecting the Chesapeake Bay plant life.
 - 5.3.2 Support agricultural roundtable discussion about challenges farmers face in managing byproducts and other environmental hazards.
 - 5.3.3 Incorporate agricultural environmental challenges into the hazard mitigation plan for future consideration.
- 5.4 Increase spatial awareness of region-wide physical, human and environmental geographic physiognomies.
 - 5.4.1 Develop and maintain inventory of meaningful and useful regional maps (interactive/static).
 - 5.4.2 Design training for GIS decision making (economic, environmental, utility, health, EM, etc.) Provide project specific GIS analysis.
 - 5.4.3 Provide project specific GIS analysis.
 - 5.4.4 Offer general GIS problem solving tools/programs/strategies.

⁷ While existing planning is in place, the HMPU does suggest implementing some broad based educational strategies for the public and localities.

Northern Shenandoah Valley Regional Commission CEDS Action Plan Matrix

Vision Statement:

The Northern Shenandoah Valley is a place where residents are meaningfully employed, beautiful natural resources are readily accessible, and a supportive business environment creates opportunity for residents and newcomers alike.

GOAL AREA 1: WORKFORCE

Expand workforce opportunities and address training gaps by increasing partnerships across the Northern Shenandoah Valley region.

OBJECTIVE 1.1 Understand capacity of service providers in the Northern Shenandoah Valley Region and measure the effectiveness of their programs.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Other Resources	Performance Measures
1.1.1 Coordinate with workforce partners to create an interview or survey to identify what programs are currently offered related to in demand occupations, and the level of enrollment.	NSVRC, High Schools, LFCC, BRCC, Shenandoah University, NW Works, Workforce Initiative	High	Staff-time	LFCC Workforce Solutions enrollment data output, Jobs EQ, Local businesses (Chamber), local EDA's	Creation of survey, Number of responses, create a metric report out
1.1.2 Partner with school divisions to evaluate existing Work-Based Learning (WBL) programs. Expand WBL programs and business partnerships.	High Schools, Target Industry Businesses, Workforce Initiative, Chamber	High	Staff-time	WBL Matrix, Curriculum and evaluation criteria for existing WBL programs, CTE Coordinators, WBL Coordinators, Career Coaches, Local EDA's and Chamber (Business Contacts)	Establishment of WBL coordinator in each school division, percent (or number) of 9th-12th grade students participating annually in WBL program, number of students who go onto full time employment, number of businesses participating
1.1.3 Conduct "before and after" surveys of program participants to track results that can be used as performance metrics for workforce organizations and the NSVRC.	Public school divisions, LFCC, BRCC, NSVRC, Workforce Initiative	High	Public Schools	Existing data collection	Number of skills gained, skills enhanced (information acquired from before and after survey from training participants); Number of trainings sessions completed; number of people trained; Change in median income over five years; average annual wages; track awards of participants

OBJECTIVE 1.2 Continue ongoing monitoring of workforce needs.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
1.2.1 Collect local business retention program outputs as they relate to workforce demands.	Local EDOs, NSVRC	High	Staff-time/Planning Partnership Grant	Local EDO business retention program outputs	Collection of all 6 feedback, quarterly summary of findings to include: percentage of business with a workforce challenge, workforce challenges related to technical skills, etc.
1.2.2 Annually review the industry employment needs projected out 10 years to detect any needs not currently being met by the service providers.	SVWDB, Workforce Initiative Taskforce	High	Staff time	Industry and occupation forecasting database	Report of highest demand occupations projected for the region
1.2.3 Analyze results of the data collection in 1.2.1 and 1.2.2 using visuals and graphics. Present findings to a joint meeting of the local EDAs.	Local EDOs, NSVRC	High	Staff-time/Planning Partnership Grant	Cooperation of EDOs	Attendance

OBJECTIVE 1.3 Enhance regional collaboration as it relates to developing a sustainable workforce.					
Task	Lead Stakeholder / Partners	Priority Level*	Funding Sources	Resources	Performance Measures
1.3.1 Build on collaborative efforts of the regional workforce partners and provide support through partnership, collaboration, and communication with non-profits, government, public schools, universities and colleges, and businesses.	NSVRC, Workforce Initiative, GO Virginia Regional Council, Chamber Workforce Development Committee, Virginia Career Works	High	Staff-time, GO Virginia	Workforce Initiative strategy, GO Virginia growth and diversification plan, valley workforce, VAN, VEC	2019 Involvement of southern part of the region in Manufacturing week, WoW! Execution, yearly meeting between the two regions
1.3.2 Support workforce development by facilitating the growth of new relationships and expanding existing partnerships between localities, businesses, and service providers.	All Stakeholders	High	NA	Current partners and programs	# of new connections established
1.3.3 Build off GO Virginia initiative to create a regional private/public training loan pool to offer a resource for individuals who want to upskill. Collaborate with Region 8 GO Virginia Council to establish training loan pool for the next year's budget.	SVWBD	Moderate	Local governments, EDAs, private sector, GO Virginia	GO Virginia growth and diversification plan	Number of businesses contributing to training loan pool
OBJECTIVE 1.4 Increase awareness of workforce opportunities by promoting regional career pathways.					
Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
1.4.1 Collaborate with workforce stakeholders to create a specific marketing campaign that presents all options post high school.	SVWBD (Valley Workforce), Local EDOs, Community Colleges, VEC (Virginia Career works), SVP, Workforce Initiative, Chamber of Commerce, Local Businesses	High	GO Virginia, WIB, Localities, Private Sector support, Staff time	Workforce Initiative marketing RFP, Valley Career Hub, Consultant	Physical and digital marketing materials created and disseminated, number of establishments where materials are located
1.4.2 Establish and build the region's "talent" brand and market to target industries.	Local EDOs, SVP	Moderate	Local EDOs and SVP staff time	Consultant, Local EDA, NSVRC	Marketing materials for each targeted industry, establish a talent brand
1.4.3 Utilize social media outlets to spread the word of workforce stakeholders' programs and highlight success stories.	Workforce Initiative, LFCC, BRCC, VEC (Virginia Career Works), SVWDB (Valley Workforce)	High	Staff time, or funding source still needs to be identified	Record of workforce stakeholder social media accounts, Content Calendar	# of likes, shares, followers, etc.
1.4.4 Continue educating employers, labor force on career pathways by demonstrating examples and publishing success stories.	SHRM, Workforce Initiative, SVWDB (Valley Workforce), VEC (Virginia Career Works), Chambers of Commerce, Private Sector	Moderate	Staff time	Staff time	# of success stories published, of likes, shares, followers, etc.
1.4.5 Promote collaboration between schools and employers focusing on work-based learning programs.	CTE and Work-based learning Coordinators	Moderate	Staff time	Knowledge of private sector WBL participants, Roundtable meetings	# of businesses that are participating in a WBL program, increase in the number of participating businesses each year, number of participants in roundtable, success of WBL program
1.4.6 Collect email addresses and contact information at every meeting or event to expand the regional network.	All Stakeholders	High	Staff Time	Network of Stakeholders	Increase in attendance, # of new members, increase in project participation

OBJECTIVE 1.5 Identify, evaluate, and reduce barriers to training and employment in the Northern Shenandoah Valley. The following list includes well-known barriers or employment challenges that will be addressed by the NSVRC and their partners through CEDS.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
1.5.1 Homelessness	United Way, Valley Assistance Network (VAN), Religious institutions, Private Sector, Housing Coalition, USDA-RD	Moderate	USDA-RD	Virginia Commonwealth University Housing Study, ALICE Report	# transitioned into permanent housing, # retained job for 6 months, student attendance
1.5.2 Criminal Background	Re-entry Council, Private Sector	Moderate	To be determined Quarter 1 2019	Ban the Box	# of felons placed, # of felons that retained job 6+ months
1.5.3 Substance abuse	Substance Abuse Coalition, Private Sector	Moderate	To be determined Quarter 1 2019	Treatment facilities	# of Drug Court Graduations, # of
1.5.4 Access to child care	United Way, Valley Assistance Network (VAN), Private Sector	Moderate	To be determined Quarter 1 2019	Pollywog Place, Winchester Day, Freemont St. Nursery models	# of child care centers for low income families
1.5.5 Access to transportation	NSVRC, RiseSmart, MPO, Local Planners, Private Sector, VDOT	Moderate	Public-Private partnerships, employer subsidies, VDOT (LAP)	Transportation plans	# of rideshares established, # of monthly riders on public transportation
1.5.6 English language learner	Literacy Volunteers, Private Sector	Moderate	To be determined Quarter 1 2019	LFCC, BRCC, SU	# of job placements
1.5.7 Financial literacy and education	Virginia Cooperative Extension, Valley Assistance Network (VAN), NW Works	Moderate	Virginia Tech VCE, Volunteers	LFCC, VEC, BRCC	# of trainings completed
1.5.8 Physical, mental, or learning disabilities	DARS, DBVI, NW Works	Moderate	To be determined Quarter 1 2019	To be determined Quarter 1 2019	# of trainings completed, # of job placements

GOAL AREA 2: VISITATION

By supporting regional and local efforts, help highlight the region's natural amenities and quality of life to boost the tourism industry, preserve natural resources, and draw new residents.

OBJECTIVE 2.1 Support the Shenandoah Valley Tourism Partnership and the Shenandoah Valley Tourism Association as they work to strengthen activities that brand and promote the region.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
2.1.1 Promote opportunities for current and potential tourism-based business representatives to share information through networking events, trainings and workshops, or mentorship programs.	SVTA, , SVTP, Chambers of Commerce, VTC, Local DMOs, NSVRC, Spirits Trail, Artisan Trail	High	DHCD, Virginia Main Street, VTC, USDA, localities	Staff, models, SBDCs, Draft Tourism Development Plan	Number of localities involved in tourism project, # of events, participation
2.1.2 Help to promote established brands through social media channels and adding links to Valley tourism organizations to the NSVRC website.	NSVRC, Local DMOs, Regional DMOs	High	Staff time	Web links	Click throughs
2.1.3 Encourage local businesses to increase awareness of brand through adding their logo(s) to their website and social media platforms.	Local DMOs, Chambers of Commerce	Moderate	Staff time	Websites, Visitor Guides	# of businesses that showcase the Regional DMOs' logos, # of referrals
2.1.4 Establish taskforce subcommittee responsible for revitalizing the outdoor asset map for the whole valley (NSVRC & CSPDC).	SVTP, SVTA, Local DMOs, NSVRC, CSPDC	High	Staff time	Existing outdoor asset maps, Trip, All Trails	Asset map developed

OBJECTIVE 2.2 Partner with localities and tourism agencies to increase transportation options surrounding recreational and natural assets.					
Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
2.2.1 Identify roadway segments appropriate for retrofit with bike lanes; work with VDOT to implement.	NSVRC, MPO, VDOT, Winchester Wheel Men, Shenandoah Bike Coalition	High	VDOT	VDOT, published guides	One bike/ped plan per locality, miles of bike lanes created
2.2.2 Designate US Bike Route 11 through the region.	NSVRC, VDOT, Virginia Bicycling Federation, Shenandoah Nat'l Park, counties, localities	High	VDOT	US Bike Route System	Route identified, designated and signed
2.2.3 Work with the state, National Park, bike clubs, tour operators, and localities to educate motorists and bicyclists on sharing the road.	NSVRC, MPO, VDOT, DMV, localities, Bike Virginia, bike touring clubs and tour operators	High	VDOT, DMV	www.shareVAroads.org; brochure	Number of brochures distributed; Number of positive press mentions
2.2.4 Continue work with localities to develop additional transportation ideas like shuttles, ride sharing, or trolleys between the most visited recreational sites.	NSVRC, MPO, Local Planners	High	DRPT	Trail Angels, PATC	Number of transportation options between visitation sites
OBJECTIVE 2.3 Develop recreational trails.					
Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
2.3.1 Inventory all existing Blueways, Hiking, Mountain biking, Horse, and OHV trails.	Local DMOs, NSVRC, Local Planners	High	Staff time	Virginia Outdoors Plan	Inventory completed
2.3.2 Identify potential Blueways, Hiking, Mountain Biking, Horse, and OHV trails.	Local DMOs, NSVRC, Local Planners	Moderate	Staff time	Virginia Outdoors Plan	Inventory completed
2.3.3 Prioritize elements of trail development for each category: Blueways, Hiking, Mountain Biking, Horse, and OHV trails.	Local DMOs, NSVRC, Local Planners	Moderate	Staff time	Virginia Outdoors Plan	Priority list established
2.3.4 Advance the conversion of the discontinued Manassas Gap rail line between Strasburg Junction and Broadway to a multi-use trail.	Local DMOs, NSVRC, Local Planners, Norfolk Southern, CSX, Rails to Trails Committee, CSPDC, VDOT, DCNR	Moderate	Staff time	Local maps, Norfolk Southern and CSX maps	Project development stages completed; Number of Rails to Trails meetings conducted in the region

GOAL AREA 3: BUSINESS DEVELOPMENT & SUPPORT

Support efforts to retain and expand existing businesses to increase profitability and community vitality. Target those that are economically supported by the region's unique assets.

OBJECTIVE 3.1 Work with localities in the Northern Shenandoah Valley to strengthen the Agribusiness industry, support farmers, and cultivate programs to expand the industry's output and geographic reach.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
3.1.1 Establish a "Northern Shenandoah Valley Regional Agricultural Development Council" to guide the business support efforts as well as retention and expansion activities directly related to agribusiness.	SET Agricultural Team	High	Staff time	SET Plan, Agricultural Census	NSVADC established
3.1.2 Establish a regional agribusiness brokerage, as a physical and virtual presence.	NSVADC, NSVRC	Low	VDACS	SET Plan, Agricultural Census	Physical presence established, virtual presence established
3.1.3 Highlight the region's agricultural roots and promote locally grown produce through a coordinated marketing effort. Expand message beyond the Northern Shenandoah Valley region to metros in close proximity.	NSVADC, Local EDAs, Virginia Cooperative Extension, Tourism partners, NSVRC	Moderate	VDACS	SET Plan, Agricultural Census	Brand established, # of ag related conferences or events
3.1.4 Hold roundtable discussion with local farmers to determine which products are the most in need of processing for regional distribution.	Local Farmers, VCE	High	Staff time	SET Plan, Agricultural Census	# of attendees
3.1.5 Identify a strategy to increase regional food processing capacity for crops and livestock.	NSVADC	Moderate	VDACS (AFID Planning)	SET Plan, Agricultural Census	Number of funding sources identified for food distribution/processing center
3.1.6 Determine three potential parcel(s) for a processing/distribution plant and establish conversations with localities about possibility of attracting development.	Local EDOs	Moderate	Staff time	Consultant	3 parcels identified

OBJECTIVE 3.2 Partner with and support those localities in the Northern Shenandoah Valley who are working to retain and expand existing businesses, and attract new businesses.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
3.2.1 Ensure each locality has identified target industry clusters, and has a local economic development strategic plan in place that aligns with their comprehensive plan.	Local EDOs	Moderate	GO Virginia	VEDA Cardinal Team, consultants, NSVRC	6 Local ED Strategies adopted, target clusters identified
3.2.2 Develop a comprehensive list of funding sources for new and existing businesses to leverage as they expand.	Local EDOs, NSVRC, SBDC	High	Staff time	USDA -RD, DHCD, VEDP, Local Incentives, HUD,	# of grant applications written to support expanding businesses

3.2.3 For small businesses looking to scale up, work with the Small Business Development Center to provide resources and a path from sole proprietor to hiring employees.	SBDC	High	GO Virginia	TEconomy data, Angel Investors, Local Business Retention Programs, Co-Working spaces, incubators	# of companies assisted, # of new employees, new commercial investment, # of new sq. ft., # of new companies
3.2.4 Assist localities with identifying all "zones", and leveraging the maximum benefits of each within their community.	NSVRC, Local EDOs	High	Staff time	Hub Zone, Technology Zone, Opportunity Zone, Tourism Zone, Enterprise Zone	inventory of Zones identified
OBJECTIVE 3.3 Strengthen and promote the role of the NSVRC as a regional resource hub for localities and their economic development and planning departments.					
Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
3.3.1 Facilitate a quarterly meeting or conference call with representatives from the economic development and planning departments of all member-localities. Establish agenda and benchmarks for each call.	NSVRC, Local Economic Development Directors, Local Planning Directors	High	Staff time	Agendas, Minutes	Quarterly meetings formally established for localities; number of participants; topics addressed
3.3.2 Continue to support the Region 8 GO Virginia Economic Development Ad Hoc Group as they advise the Region 8 Council. Utilize this group as the Regional Economic Development Advisory Committee.	GO Virginia Support Organizations, Economic Development Ad Hoc Committee	High	GO Virginia	GO Virginia Growth and Diversification plan	Number of projects NSVRC supports on GO Virginia Council, REDAC Established
3.3.3 Ensure the economic development official from each member-locality is either part of this committee or on the quarterly call. Benchmark their progress and how they are administering their own efforts.	NSVRC, Economic Development Officials	High	Staff time	Staff time	Number of economic development officials on GO Virginia Economic Development Ad Hoc Group
OBJECTIVE 3.4 Partner with government, public schools, universities and colleges, and businesses to become an entrepreneurial region of innovative ideas and technologies capable of fulfilling future market demands.					
Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
3.4.1 Support the development of an incubator space and entrepreneurship programming in the region.	Shenandoah University, Local EDAs	High	Localities, Shenandoah University, Economic Development Administration	TEconomy Regional Entrepreneurial Assessment Report, GO Virginia Growth and Diversification Plan, Winchester EDA Strategic Plan	Establishment of physical space for incubator, establishment of incubator programming; # of companies assisted, # of new employees, # of new companies,
3.4.2 Support the creation of support networks for new startups, including mentorships that connect entrepreneurs with established business owners.	Shenandoah University, Local EDAs, Chambers of Commerce	Moderate	Time of University Staff and Students, Support of local business leaders	SBDC, Workforce Initiative	Establishment of a virtual networking space where connections can be made; # of new connections established between entrepreneurs and established businesses
3.4.3 Involve local businesses and community leaders in mentoring area university students in business and entrepreneurship.	Shenandoah University, regional businesses	Moderate	Time of University Staff and Students, Support of local business leaders	Shenandoah University LAMP model, Local EDAs, Workforce Initiative	Establishment of a virtual networking space where connections can be made; # of new connections established between entrepreneurs and established businesses

GOAL AREA 4: SITE READINESS

OBJECTIVE 4.1 Ensure there is a regional inventory of sites available to suit target industry clusters with <18 months to market.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
4.1.1 All sites that are available for sale or lease are identified with full data on Virginia Scan.	Local EDOs, VEDP	High	Staff time	Virginia Scan	Metrics on marketing efforts of sites within each locality; Number of businesses attracted to currently vacant sites
4.1.2 Expand on current site characterization efforts to include completion of due diligence work at a minimum (Tier 3 Characterization).	Local EDOs and IDAs, private land owners	Moderate	Go Virginia, VBRS	VBRS	Number of sites being developed with improvements; Number of sites with improved ranking through VBRS Program;
4.1.3 Identify best use scenarios for high priority sites to market.	Local EDOs	Moderate	GO Virginia, Local funds,	Local strategic plans, local comprehensive plans	Metrics on marketing efforts of sites within each locality; Number of businesses attracted to currently vacant sites

OBJECTIVE 4.2 Continue to discuss region-wide infrastructure needs and track ongoing projects with localities.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
4.2.1 Discuss issues of aging infrastructure, and prioritize capital improvements, on quarterly calls with regional economic development and planning departments.	Local EDOs, Planners, Administrators	Moderate	USDA, EDA, VDOT, Utilities	CIPs	# of proposed projects, # of completed projects
4.2.2 Track the progress of, and continue to contribute to, the I-81 improvement effort.	MPO, Local Governments, Commonwealth Transportation Board, I-81 Chamber Coalition, NSVRC, GO Virginia Regional Council	Moderate	Staff time	VDOT, General Assembly	Amount of funding secured for I81
4.2.3 Establish councils of related utility providers to advise and support local planners and EDOs.	Local EDOs and planners	High	Staff time	other councils of the same nature	Councils established
4.2.4 Support ongoing state and local efforts to expand broadband coverage and increase speed of broadband.	Localities, Telecommunications providers	Moderate	Staff time, DHCD	Page County Broadband Authority, Statewide broadband initiative.	Change in percentage of broadband coverage, by speed, across localities; Change in cell coverage across localities; Cost and quality of broadband coverage across localities

GOAL AREA 5: HAZARD AWARENESS & ENVIRONMENTAL RESILIENCY

Develop and implement programs to increase the awareness of natural hazard mitigation efforts that target the public and local governments.

OBJECTIVE 5.1 Offer hazard mitigation and disaster preparedness training to educate the public and localities about the dangers of natural hazards.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
5.1.1 Develop list of locations where trainings could take place, existing events to present at, and/or online training programs.	NSVRC	Moderate	Staff time	HMP	Inventory of locations for training, dates established for each training location
5.1.2 Present hazard mitigation tactics to localities at their regular meetings.	FEMA, NSVRC	Moderate	Staff time	HMP	Number of local governments who have received public presentations on how to implement mitigation policies
5.1.3 Draft MOUs, policies, or resolution language that, once implemented, incorporate mitigation planning into the framework of local government planning in the NSV Region.	NSVRC, Local Planners	Moderate	Staff time	HMP	Number of mitigation policies that have been passed in local government
5.1.4 Work with localities to identify and prioritize a list of cost-effective structural projects to reduce the impact of hazards.	NSVRC, Local planners	Moderate	Staff time, VDEM, FEMA	HMP	Number of sites outside flood inundation zones; Hazard map created which delineates "do not build zones"

OBJECTIVE 5.2 Use data to help show current efforts and existing needs in hazard mitigation efforts.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
5.2.1 Update data as necessary for localities and public outreach.	NSVRC	High	Staff time	HMP	Data up to date and reported out as necessary
5.2.2 Create easy-to-understand maps and graphics to supplement findings of Hazard Mitigation Plan.	NSVRC	High	Staff time	HMP	Number of website "hits" or downloads of educational resources on NSVregion.org

OBJECTIVE 5.3 Rectify the pollution of the Shenandoah River and Chesapeake Bay Watershed from Agricultural byproducts and runoff.

Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
5.3.1 Support and help coordinate implementation of the Chesapeake Bay Phase III Watershed Implementation Plan's recommendations affecting the Chesapeake Bay plant life.	NSVRC, Lord Fairfax Soil and Water Conservation District, DEQ	High	DEQ	WIIP	Number of recommendations progressed from idea to implementation for maintaining water quality
5.3.2 Support agricultural roundtable discussion about challenges farmers face in managing byproducts and other environmental hazards.	Virginia Cooperative Extension, NSVRC	High	DEQ	WIIP	Number of farmers at agricultural roundtable; number of projects established out of agricultural roundtable
5.3.3 Incorporate agricultural environmental challenges into the hazard mitigation plan for future consideration.	NSVRC	Low	DEQ	Current Hazard Mitigation Plan	Changes incorporated

OBJECTIVE 5.4 Increase spatial awareness of region-wide physical, human and environmental geographic physiognomies.					
Task	Lead Stakeholder / Partners	Priority Level	Funding Sources	Resources	Performance Measures
5.4.1 Develop and maintain inventory of meaningful and useful regional maps (interactive/static).	NSVRC, Local planners, Local GIS departments	Moderate	Staff time	HMP, WIIP, General Planning	Map/data updates, map/data requests
5.4.2 Design training for GIS decision making (economic, environmental, utility, health, EM, etc.).	NSVRC, Local planners, Local GIS departments, Utility departments, Emergency Management officials	Moderate	Staff time	HMP, WIIP, General Planning	Number of attendees trained
5.4.3 Provide project specific GIS analysis.	NSVRC, Local planners, Local GIS departments, Utility departments, Emergency Management officials, Project Managers, Engineering departments	Moderate	Staff time	HMP, WIIP, General Planning	Map/data updates, map/data requests
5.4.4 Offer general GIS problem solving tools/programs/strategies.	NSVRC, Local planners, Local GIS departments, Emergency Management officials, Project Managers, Engineering departments	Moderate	Staff time	HMP, WIIP, General Planning	Map/data updates, map/data requests

Appendix E: Disaster Resilience

In planning for economic development, a community must consider inevitable shocks to its economic system. The economy must withstand these shocks and recover quickly, and create an economic system to moderate disruptions from happening initially. Economic resiliency measures are especially needed when a natural disaster event occurs, but are also important during times of national or industry-wide downturn.

Major Risks

The foremost natural hazard facing the NSV Region is flooding, winter storms/extreme cold, high winds/hurricanes, and tornadoes. Moderate hazards include lightning, thunderstorm/hail, pipelines, mass evacuation from the Washington DC area, hazardous material spills, wildfire, dam failure/low bridges, extreme heat, and drought. Low risk hazards include earthquakes, landslides, hail, erosion and land subsidence/karst soil.⁸

Preparedness

The NSV Region has undergone pre-disaster goal setting, action planning, and stakeholder identification in the event that a natural disaster strikes. They are prepared by locality to enact a response strategy that quickly diverts resources to the appropriate location.

In its Hazard Mitigation Plan, the NSV Region identifies mitigation actions and responsible parties. Further, an analysis of emergency management capacity and plans found that each locality has sufficient resources to ensure action in the face of a natural disaster. The plan indicates multiple internet and phone providers throughout the region; a robust GIS and an online, interactive mapping tool; and safe building practices.

Safe building practices through planning tools (land use and transportation planning, presence and enforcement of comprehensive zoning and subdivision ordinances, and building codes) were determined sufficient, with the exception of several towns lacking a comprehensive land use plan. Mapping resources include a GIS of the region and the NSVRC Hazard Mitigation online portal, which includes interactive maps that allow members to see hazards of their particular region or property. Maps on this portal are updated at least bi-annually. Additionally, with 11 internet providers and five local telephone providers, there is good telecommunications coverage throughout the region.

Future Work

The soon-to-be-adopted comprehensive Natural Hazards Mitigation Plan outlines the future work of each locality, indicating priorities in matrix form. This work is in line with creating a more robust response to natural disasters, and mitigating factors that would make response and recovery more difficult. Each action plan contains specific steps, responsible parties, and funding source to direct efforts. This regionally coordinated effort implemented locally ensures gaps are filled at the local level, making the entire region less susceptible to negative impact of a natural disaster.

While each locality has a specific action plan, there are some themes that span across the NSV Region. Across localities the following **high priorities** are generally consistent: create programs geared towards public education both in response and mitigation (at schools, through local media outlets, to businesses

⁸ NSVRC Hazard Mitigation Plan Update, DRAFT December 2017 <http://www.nsvregion.org/hazard-mitigation.html>

and residents in flood prone areas, while obtaining building permits, etc.); enhance response communication systems (911 or other); identify gaps in community resources needed for a response effort (community facilities, generators, community vehicles, communications, etc.); review or create ordinances and planning efforts to have more restrictive building practices in flood prone areas; and remove debris from stormwater systems regularly.

Northern Shenandoah Valley Region Overview

The following is an overview of environmental factors, regional characteristics and infrastructure resources that are critical to considering future economic development work throughout the Northern Shenandoah Valley. The maps and figures that accompany this narrative are sourced from Chapter 3 of NSVRC's Hazard Mitigation Plan.

Location:

Situated within the Northern Virginia portion of the Appalachian Mountain Range, the Northern Shenandoah Valley lies approximately 50 miles east of the US capitol of Washington, DC. A more rural counterpart to its neighbors to the east, this region features a rural makeup of rolling hills and open farm land. Its western border is shared with West Virginia, and it's a short distance from the state of Maryland.

Landscape:

Home to nearly 7,000 linear miles of rivers and streams, the region intersects 78 NRCS (Natural Resource Conservation Service) recognized watershed boundaries, which intersect over 36,000 acres of NWI (National Wetlands Inventory) inventoried wetlands. Flowing south to north, over 300 miles of the Shenandoah River and its branches run through the central part of the valley. It's separated from Virginia's Piedmont region by the Blue Ridge Mountain chain. Lying just within the eastern border of Page County is the region's highest point, known as Stony Man, rises to 4,000 feet above sea level (USGS). Clarke's highest peak is Buzzard Hill, Frederick's is Pinnacle, Shenandoah's is Mill Mountain, Warren's is Hogback Mountain, and the City of Winchester's highest point is Bower's Hill.

Climate:

The climate of the Shenandoah Valley, particularly regarding precipitation, is strongly influenced by the surrounding mountains. When moist air flows toward Virginia from areas to the west and northwest, it encounters the high relief of the Allegheny Mountain system to the west of the Shenandoah Valley.

A double "rain shadow" effect, due to orographic uplift on either side of the Blue Ridge Mountains, puts the Shenandoah Valley in the driest portion of Virginia and makes it one of the driest locations in the eastern United States.

Typical annual precipitation amounts for nearby stations on the east-facing slopes of the Blue Ridge Mountains run about ten inches higher than the Shenandoah Valley (around 48 inches as opposed to 38 inches). Statewide average annual precipitation is around 40 to 44 inches.

Natural Hazards

A list of natural hazards was identified by the steering committee in terms of threats to recovery, as well as capacity to respond to a hazard. The ranking methodology included a survey poll issued to the localities and responses collected by NSVRC staff and summaries reviewed by the steering committee. It also involved analysis of GIS mapping, including interactive maps presented on the NSVRC Hazard Mitigation online portal. According to research and analysis conducted by the 2017 Hazard Mitigation

steering committee, the most pertinent natural hazards affecting the NSV Region were flooding, winter storms/extreme cold, high winds/hurricanes, and tornadoes.

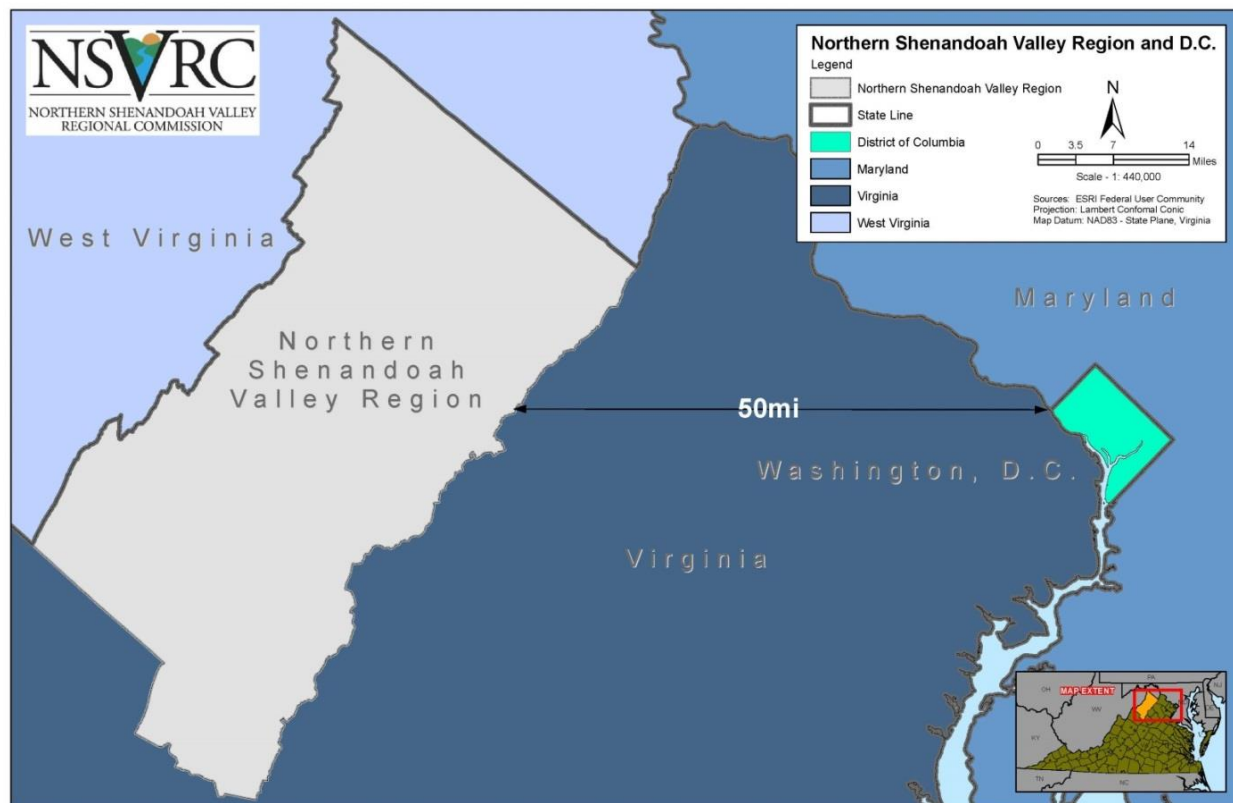
Highways, Interstates, Major Roads

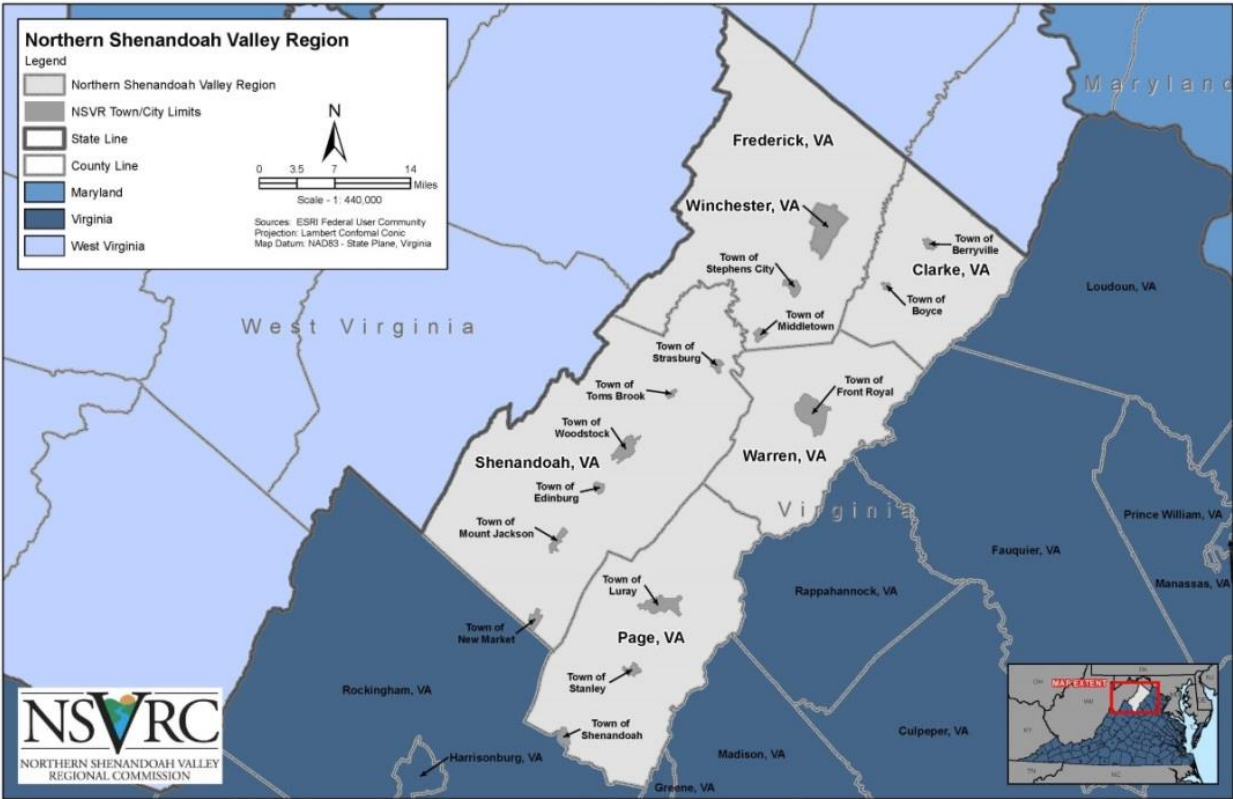
Two major US Interstates intersect the Northern Shenandoah Valley Region. Interstate 81 operates North/South through the western portions of Frederick and Shenandoah Counties, while Interstate 66 enters Warren County from the East, connecting with Interstate 81 near the Frederick/Shenandoah County borders. Several notable arterial highways provide access to these interstates. US 11 runs parallel to Interstate 81, operating North/South throughout the entire length of region. US 522 proceeds diagonally through Frederick County, enters Clarke at its SW corner, and then connects with US 340 North/South in Warren County. US 50 operates East/West through Frederick County and intersects with US 17 in Clarke. Skyline Drive (State Route 48) is a scenic highway that runs along the Eastern border of Warren and Page Counties, attracting a continuous flow of tourists annually.

Virginia Inland Port

The Virginia Inland Port offers wheeled storage, grounded storage, and general open storage. There are currently 19 acres available here for lease. It has direct access to Interstates 81 and 66, and is home to 17,280 linear miles of railroad tracks.

Location:





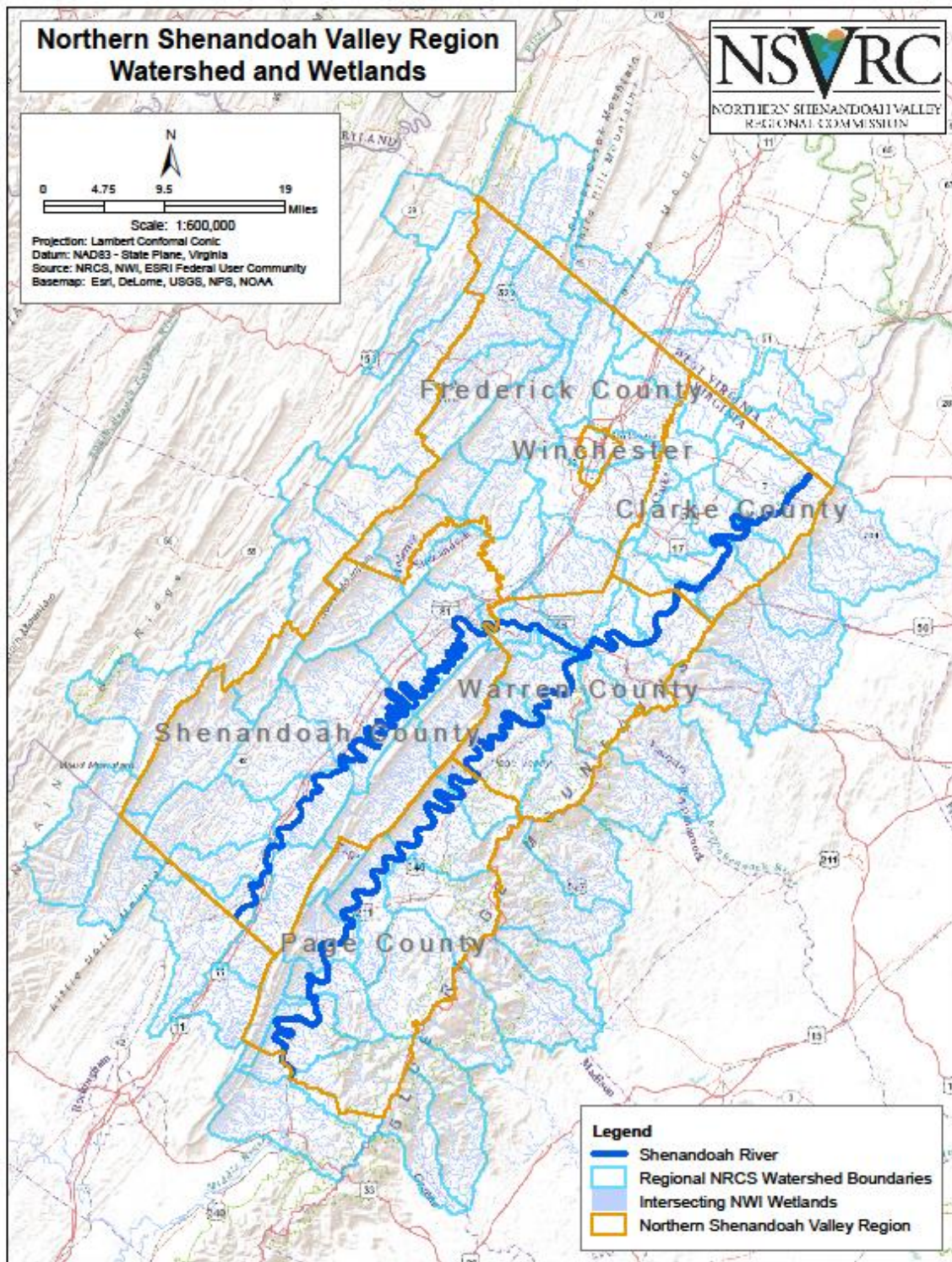
Housing:

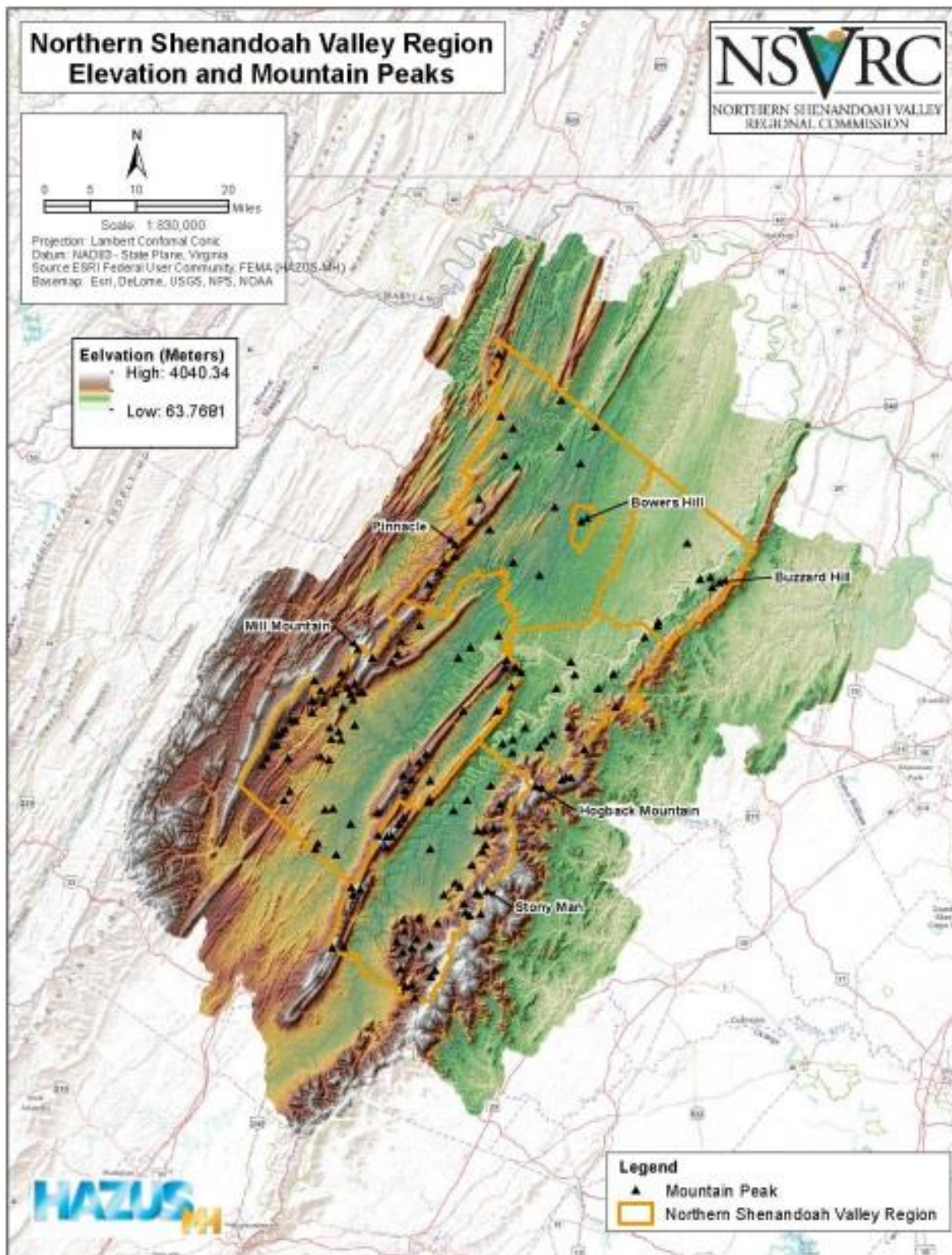
Table 3.19 - Northern Shenandoah Valley Region Housing Units, Density, Occupancy Rates and Median Values				
Locality - (Area)	Number of Units	Housing unit density	% Occupied	Median value of owner-occupied housing units
Clarke County - (175.9 sq mi)	6,333	36	88%	\$329,500
<i>Berryville (2.3 sq mi)</i>	<i>1,796</i>	<i>781</i>	<i>87%</i>	<i>\$295,800</i>
<i>Boyce (0.4 sq mi)</i>	<i>260</i>	<i>650</i>	<i>96%</i>	<i>\$296,400</i>
Frederick County - (413.5 sq mi)	33,381	80	92%	\$243,600
<i>Middletown (0.8 sq mi)</i>	<i>558</i>	<i>698</i>	<i>96%</i>	<i>\$163,500</i>
<i>Stephens City (2.4 sq mi)</i>	<i>878</i>	<i>366</i>	<i>90%</i>	<i>\$171,700</i>
Page County - (310.8 sq mi)	11,674	37	81%	\$176,000
<i>Luray (4.8 sq mi)</i>	<i>2,227</i>	<i>464</i>	<i>86%</i>	<i>\$174,600</i>
<i>Shenandoah (2.2 sq mi)</i>	<i>1,209</i>	<i>550</i>	<i>84%</i>	<i>\$143,700</i>
<i>Stanley (1.4 sq mi)</i>	<i>794</i>	<i>567</i>	<i>86%</i>	<i>\$153,500</i>
Shenandoah County - (508.3 sq mi)	21,163	41	81%	\$198,900
<i>Edinburg (0.8 sq mi)</i>	<i>571</i>	<i>714</i>	<i>84%</i>	<i>\$159,000</i>
<i>Mount Jackson (2.7 sq mi)</i>	<i>907</i>	<i>336</i>	<i>85%</i>	<i>\$130,100</i>
<i>New Market (2.0 sq mi)</i>	<i>1,043</i>	<i>522</i>	<i>91%</i>	<i>\$191,200</i>
<i>Strasburg (3.7 sq mi)</i>	<i>3,155</i>	<i>853</i>	<i>88%</i>	<i>\$182,400</i>
<i>Toms Brook (0.1 sq mi)</i>	<i>122</i>	<i>1,220</i>	<i>93%</i>	<i>\$155,300</i>
<i>Woodstock (3.9 sq mi)</i>	<i>2,287</i>	<i>586</i>	<i>91%</i>	<i>\$188,200</i>
Warren County - (213.8 sq mi)	16,268	76	89%	\$213,500
<i>Front Royal (10.3 sq mi)</i>	<i>6,348</i>	<i>616</i>	<i>88%</i>	<i>\$170,100</i>
Winchester City - (9.2 sq mi)	11,907	1,294	89%	\$216,300
NSVR Total - (1,622.3 sq mi)	100,726	62	AVG: 89%	\$229,633

Household Income:

Table 3.11 - Northern Shenandoah Valley Region Median Household Income	
Locality	Median Household Income
Clarke County	\$71,986
<i>Berryville</i>	<i>\$56,591</i>
<i>Boyce</i>	<i>\$72,083</i>
Frederick County	\$68,929
<i>Middletown</i>	<i>\$60,625</i>
<i>Stephens City</i>	<i>\$55,625</i>
Page County	\$45,030
<i>Luray</i>	<i>\$39,152</i>
<i>Shenandoah</i>	<i>\$40,139</i>
<i>Stanley</i>	<i>\$32,895</i>
Shenandoah County	\$50,450
<i>Edinburg</i>	<i>\$40,375</i>
<i>Mount Jackson</i>	<i>\$35,750</i>
<i>New Market</i>	<i>\$36,815</i>
<i>Strasburg</i>	<i>\$50,676</i>
<i>Toms Brook</i>	<i>\$55,750</i>
<i>Woodstock</i>	<i>\$35,267</i>
Warren County	\$63,734
<i>Front Royal</i>	<i>\$47,981</i>
Winchester City	\$46,466
NSVR Average	\$50,316

Landscape:





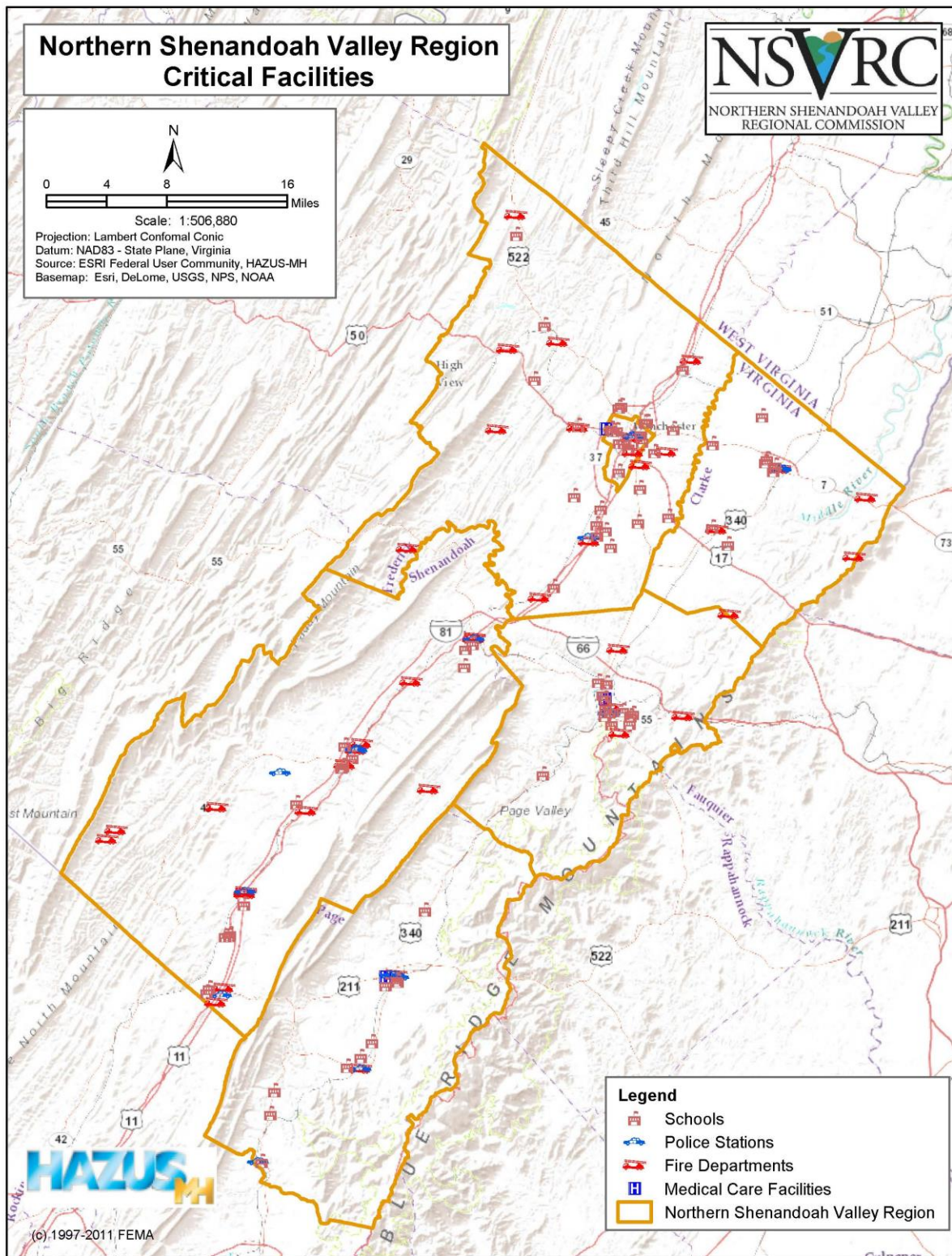
Climate:

Northern Shenandoah Valley Region Climate Statistics	
Average Annual Precipitation	38.02"
Average Annual Snowfall	16.7"
Average Annual Temperature	52.6°
Average Annual Max Temp	64.9°
Average Annual Min Temp	40.4°

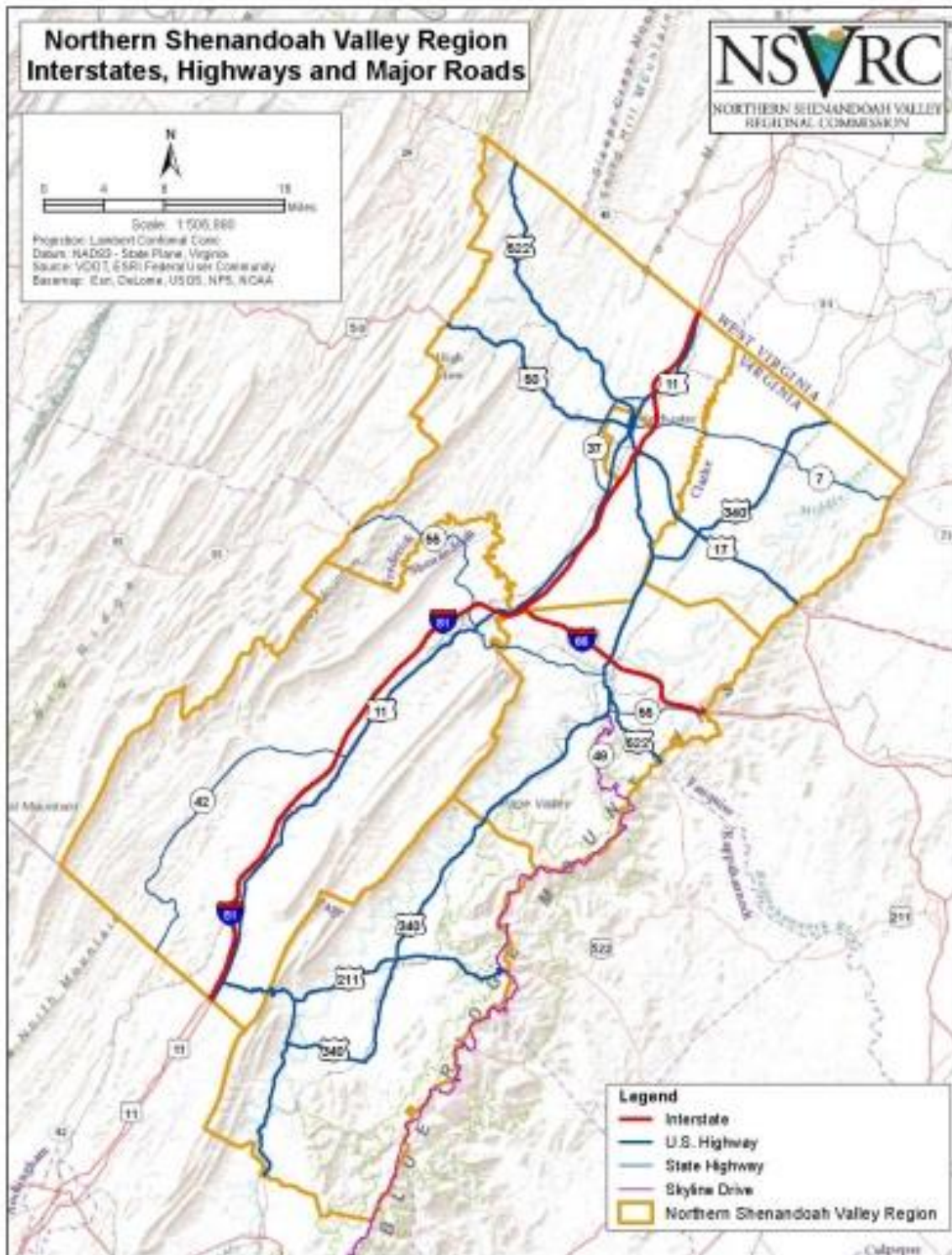
Hazard Rankings:

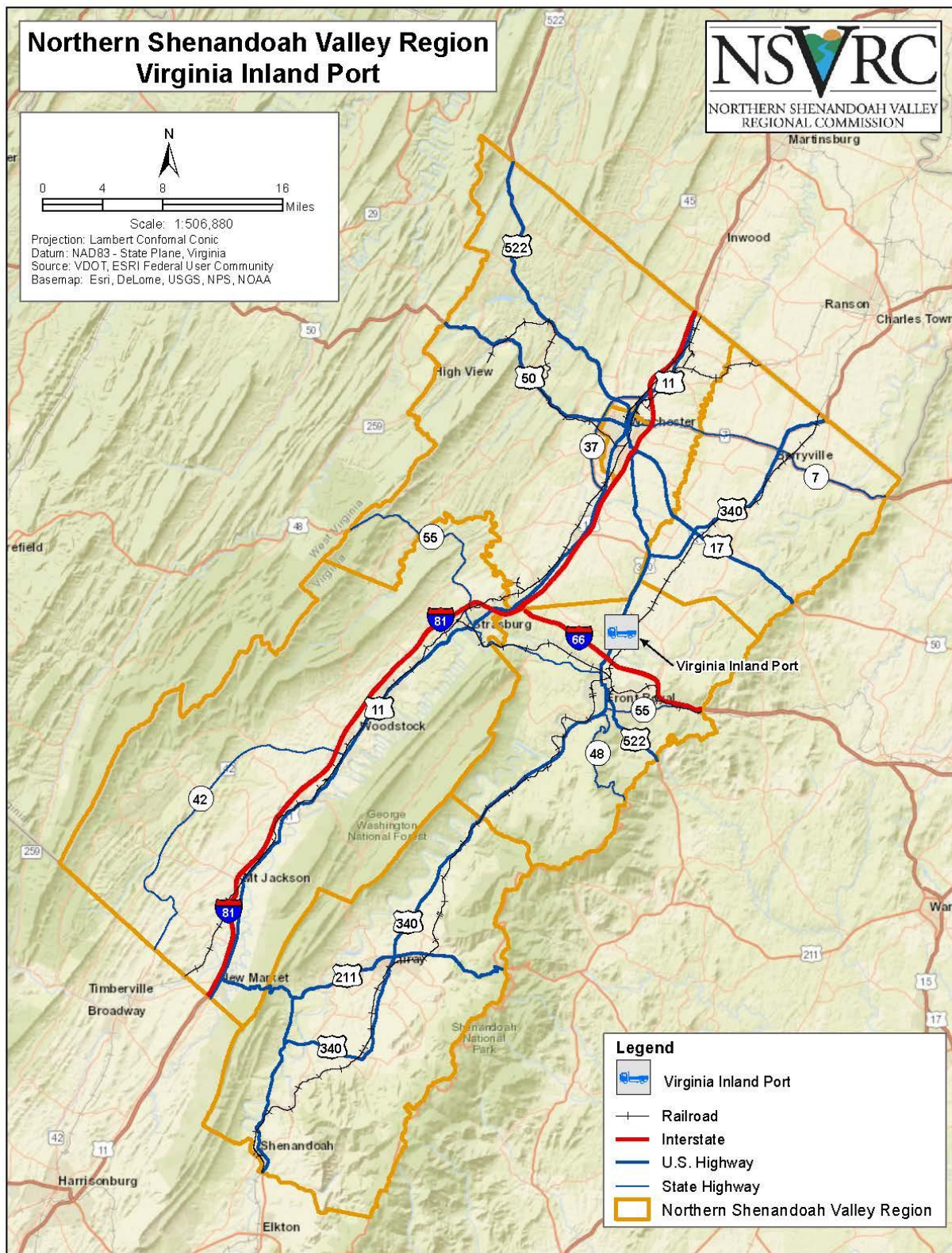
Northern Shenandoah Valley Region 2017 Hazard Inventory, Rankings and Consideration Levels		
Hazard	Type	Ranking/Consideration
Flooding	Riverine	1 - High
Winter Storms/Ice/Extreme Cold	Winter Storm/Ice Storm/Excessive Cold	2 - High
High Wind/Hurricanes	Hurricane	3 - High
Tornadoes	Tornadoes	4 - High
Lightning	Storm	5 - Moderate
Thunderstorm/Hail	Storm	6 - Moderate
Pipelines	Pipelines	7 - Moderate
Mass Evacuation from Northern VA/D.C.	Mass Evacuations	8 - Moderate
Hazardous Materials Spills	Hazardous Material Spills	9 - Moderate
Wildfire	Wildfire	10 - Moderate
Dam Failure/Low Bridges	Dam Safety	11 - Moderate
Extreme Heat	Heat	12 - Moderate
Drought	Heat	13 - Moderate
Earthquakes	Earthquake	14 - Low
Landslide/Steep Slopes	Landslide/Steep Slope	15 - Low
Hail	Storm	16 - Low
Erosion	Landslide/Steep Slope and Karst	17 - Low
Land Subsidence/Karst Soil	Karst	18 - Low

Critical Facilities Map:



Transportation:





Appendix F: Data Sources

Proprietary Data Sources

Economic Modeling Specialists International (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see www.economicmodeling.com). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

Esri Business Analyst Online (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit www.esri.com.

Public Data Sources

American Community Survey (ACS), U.S. Census

The American Community Survey (ACS) is an ongoing statistical survey by the U.S. Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. The survey is mandatory to fill out, but the survey is only sent to a small sample of the population on a rotating basis. The survey is crucial to major planning decisions, like vital services and infrastructure investments, made by municipalities and cities. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. For more information on the ACS, visit <http://www.census.gov/programs-surveys/acs/>

OnTheMap, U.S. Census

OnTheMap is a tool developed through the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. There are also visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. The OnTheMap tool can be found here, along with links to documentation: <http://onthemap.ces.census.gov/>.

Appendix G: Partner and Funding Key

ALICE	Asset Limited, Income Constrained, Employed
AFID	Agriculture and Forestry Industries Development
BRCC	Blue Ridge Community College
CIP	Capital Improvement Program
CSPDC	Central Shenandoah Planning District Commission
CTE	Career and Technical Education
CSX	Class I Railroad System
DARS	Department for Aging and Rehabilitative Services
DBVI	Department for the Blind and Vision Impaired
DEQ	Department of Environmental Quality
DMO	Destination Marketing Organizations
DHCD	Department of Housing and Community Development
DRPT	Department of Rail and Public Transportation
EDA	Economic Development Administration (or Economic Development Association)
EDO	Economic Development Organization
FEMA	Federal Emergency Management Agency
HMP	Hazard Mitigation Plan
HUD	Department of Housing and Urban Development
LFCC	Lord Fairfax Community College
MPO	Metropolitan Planning Organizations
NSVRC	Northern Shenandoah Valley Regional Commission
NSV	Northern Shenandoah Valley
NSVADC	Northern Shenandoah Valley Agribusiness Development Council
PATC	Potomac Appalachian Trail Club
REDAC	Regional Economic Development Advisory Council
SBDC	Small Business Development Council
SHRM	Society for Human Resource Management
SET	Stronger Economies Together
SVP	Shenandoah Valley Partnership
SVTA	Shenandoah Valley Travel Association
SVTP	Shenandoah Valley Tourism Partnership
SVWDB	Shenandoah Valley Workforce Development Board
USDA-RD	United States Department of Agriculture Rural Development
VAN	Valley Assistance Network
VBRS	Virginia Blue Ridge Section
VDEM	Virginia Department of Emergency Management
VDACS	Virginia Department of Agriculture and Consumer Services
VDOT	Virginia Department of Transportation
VEDP	Virginia Economic Development Partnership
VEDA	Virginia Economic Developers Association
VTC	Virginia Tourism Corporation
VEC	Virginia Employment Commission (Virginia Careerworks)
VCE	Virginia Cooperative Extension
WoW!	Worlds of Work
WBL	Work-Based Learning
WIB	Workforce Investment Board
WIIP	Chesapeake Bay Watershed Implementation Plan

Appendix H: Community Engagement

This work would not be possible without the contributions of the CEDS Project Team, who provided insight and experience in guiding the collection, synthesis, and presentation of the information contained in the Northern Shenandoah Valley CEDS. Additionally, previous engagement efforts throughout the Region 8 GO Virginia Initiative process, which resulted in the Economic Growth and Diversification Plan for Region 8, were used as a foundation to further engage the community and key stakeholders during the CEDS process. These efforts included engagement with the Region 8 Council and interviews with various work groups and leaders in industry, business, education, development, and government.

Through this intensive engagement process we were able to involve the community and key stakeholders in the creation of the Northern Shenandoah Valley Region CEDS in accordance with the U.S. Economic Development Administration CEDS requirements. These efforts help to ensure stakeholder participation and buy-in for long term planning initiatives spurred through the CEDS.

Note that individuals' titles and positions were current for the time that they were engaged in this process, which ranges from Summer 2017 to December 2018. Titles may have since changed.

NSVRC CEDS Project Team

Felicia Hart, <i>Director, Community Development and Tourism, Front Royal</i>	City of Winchester	Shockey Companies
Nadine Pottinga, <i>President United Way of the Northern Shenandoah Valley</i>	Jenna French, <i>Director of Tourism and Business Development Shenandoah County</i>	Billie Clifton, <i>Owner Backroom Brewery</i>
Richard Kennedy, <i>CEO Top of Virginia Regional Chamber</i>	Sally Hurlbert, <i>Management Specialist National Park Service</i>	Chris Kyle, <i>Vice President Shentel</i>
Lauren Cummings, <i>Executive Director Northern Shenandoah Valley Substance Abuse Coalition</i>	Rodney McLain, <i>Director of Public Works Shenandoah County Water & Sewer</i>	Len Capelli, <i>Economic Development Coordinator Clarke County</i>
Marshall Henson, <i>President & CEO NW Works</i>	Christine Kriz, <i>Director Small Business Development Center</i>	Liz Lewis, <i>Economic Development/Tourism Coordinator Page County</i>
Jon Sisler, <i>Account Manager Shenandoah Valley Electric Cooperative</i>	Carrie Chenery, <i>Executive Director and Courtland Robinson, Director of Business Development Shenandoah Valley Partnership</i>	Terry Short, <i>District Planner Virginia Department of Transportation</i>
Dennis Dysart, <i>President First Bank</i>	Elizabeth Savage, <i>Chief Human Resource Officer Valley Health</i>	Mitch Moore, <i>Vice President Shenandoah University</i>
Carla Funkhouser, <i>Director of Human Resources Georges Chicken</i>	Bonnie Landy, <i>Owner Winchester Brew Works</i>	Stephanie Lillard, <i>Development Specialist VA Tourism Corporation</i>
Shawn Hershberger, <i>Development Services Director</i>	Bill Wiley, <i>Business Development Manager, Winchester City Council</i>	Sharon Baroncelli, <i>Executive Director Shenandoah County Chamber of Commerce</i>

Kim Herbstritt
Owner/Board Member
Shady Knoll Farm/ Literacy
Volunteers

Rick Till, *Owner*
HR Dynamics; *formerly Vice*
President Human Resources

Joan Hollen, *Data and*
Communications Specialist
Shenandoah Valley Workforce
Development Board

Heather McKay, *Owner*
Marker-Miller Orchard

Todd House
Economic Development, Virginia
Washington Gas

Karl Roulston, *Owner*
Regulus Group

Jeanian Clark, *Vice President*
LFCCWorkforce Solutions

Wayne Webb, Lord Fairfax Soil
and Water Conservation District

Patrick Barker, *Executive Director*
Frederick County EDA

Jennifer R McDonald, *Executive*
Director
Warren County EDA

Stan Crockett, *Port Manager*
Virginia Inland Port; and Laura
Smith, *Economic Development*
Manager
Virginia Port Authority

Cyndy Hines, *Area Specialist* and
Anne Herring, *Virginia Rural*
Development Coordinator
USDA Rural Development

GO Virginia Region 8 Council

Name	Affiliation
Jon Alger	James Madison University
Devon Anders	InterChange Group
Stacy Barrett	Barrett Machine, Inc.
Kathlynn Brown	SRI International
Greg Campbell	Shenandoah Valley Regional Airport
Robin Crowder	Retired K-12 Superintendent
John Downey	Blue Ridge Community College
Joanie Eiland	Elk Trucking, Inc.
Tracy Fitzsimmons	Shenandoah University
Frank Friedman	CornerStone Bank & City of Lexington Mayor
Mike Goertzen	Serco, Inc.
Conrad Helsley	Shenandoah County Board of Supervisors & NSVRC Board
John King	Virginia Poultry Growers Cooperative
Chris Kyle	Shentel
Connie Loughhead	Des Champs Technologies
Keith May	Cottonwood Commercial
Jill McGlaughlin	Classic Kitchen & Bath
Mark Merrill	Valley Health System

Kathy Moore	Moore Public Relations
John Neff	Retired – Nielsen Builders
George Pace	Shenandoah Valley Angel Investors
J.J. Smith	Valley Proteins
Jeff Stapel	Shickel Corporation
Robin Sullenberger	Highland County Economic Development
Rick Till	HR Dynamics
Judith Trumbo	Virginia Mennonite Retirement Community

GO Virginia Region 8 Stakeholders

- Alan Dahl, Real estate investor
- Alison Denbigh, Independent business owner
- Amanda Glover, Augusta County Economic Development
- Ashton Harrison, Bath County
- Becky Nucilli, Shentel
- Betsy Lee, StartHere Lexington
- Betty Mitchell, The Highland Center
- Bill Frazier, Frazier Associates
- Bobbi Strother, Thermo Fisher Scientific
- Bobby Berkstresser, White's Travel Center
- Bonnie Riedesel, Central Shenandoah Planning District Commission
- Bradley Polk, Shenandoah County
- Brandon Davis, Northern Shenandoah Valley Regional Commission
- Brian Brown, Shenandoah Valley Workforce Development Board
- Carrie Chenery, Shenandoah Valley Partnership
- Chiedo, Chiedo Labs
- Chris Kyle, Shentel
- Chris Thompson, InterChange Co.
- Christina Cain, Staunton Creative Community Fund
- Christina Phillips, Whitewave Foods
- Courtland Robinson, Shenandoah Valley Partnership
- Debbie Melvin, Virginia Economic Development Partnership
- Debby Hopkins, Shenandoah Valley Workforce Development Board
- Diane Yearian, James Madison University Human Resources
- Dilton Gibbs, Kraft Heinz
- Doug Stanley, Warren County
- EG&D Subcommittee
- Elizabeth McCarty, Central Shenandoah Planning District Commission
- Frank Tamberrino, Harrisonburg Chamber of Commerce
- George Anas, Rockingham County Economic Development
- George Pace, Shenandoah Valley Angel Investors
- Gerard Eldering, Blue Vigil

- Greg Campbell, Shenandoah Valley Regional Airport
- Greg Hitchin, City of Waynesboro Economic Development
- Heather Kovaly, Thermo Fisher Scientific
- Jeanian Clark, Lord Fairfax Community College Workforce Solutions
- Jeff Stapel, Shickel Corp/SVWDB Chair
- Jen Weaver, Shenandoah Valley Partnership
- Jennifer McDonald, Front Royal/Warren County Economic Development
- JJ Smith, Valley Proteins
- Jo Lee Loveland Link, Volvox, Inc. (SB)
- Joan Hollen, Shenandoah Valley Workforce Development Board
- Joanie Eiland, Elk Trucking, Inc.
- John Downey, Blue Ridge Community College
- John Link, Volvox, Inc. (SB)
- Judith Trumbo, Virginia Mennonite Retirement Community
- Julie Suijk, Valley Health
- Karen Bowman, Shenandoah Valley Technology Council
- Kathlynn Brown, SRI International
- Keith Robinson, InterChange Co.
- Larry Kroggle, Daikin Applied Technologies
- Len Capelli, Clarke County Economic Development
- Lisa Seekford, Riddleberger Brothers
- Martin Lightsey, Cadence
- Mary Ann Gilmer, Goodwill Industries of the Valley
- Nick Swayne, James Madison University
- Patrick Barker, Frederick Count Economic Development
- Patrick McGouwm, Center for Entrepreneurship
- Paul Vitagliano, Thermo Fisher Scientific
- Peirce Macgill, City of Harrisonburg,
- Robin Sullenberger, Highland County Economic Development
- Sally Michaels, Frederick County Economic Development
- Sandy Rinker, Massanutten Technical Center
- Sharon Johnson, Shenandoah Valley Workforce Development Board
- Skylar Mouris, Shenandoah Valley Partnership Intern
- Spencer Suter, Rockbridge County
- Steve Gerome, Ball Corp.
- Susan Brooks, Navy Federal
- Tom Sheets, Blue Ridge Lumber

Note the GO Virginia Region 8 Stakeholder list is comprised of people who participated in the development of the Growth and Diversification Plan and their affiliations were current at the time the work was completed.

NSV Region SET Plan Stakeholders

State Resource TEAM

David Foster, Janice-Stroud-Bickes, Kasy Martin, Ph.D, Craig Barbrow, Matthew Underwood, Anne Herring, Lacy Ward Jr, Cyndy Bedwell, *USDA Rural Development*

Martha Walker Ph.D, *Virginia Cooperative Extension*

Douglas Jackson, *Virginia Department of Housing and Community Development*

James Pease Ph.D, *Virginia Tech, Department of Agricultural and Applied Economics*

SET Regional Leadership Team

Len Capelli, *Clarke County*

Patrick Barker, *Frederick County Economic Development Authority*

Karen Helm, Jim Kraft, *Lord Fairfax Small Business Development Center*

Stephanie Lillard, *Page County*

Leslie Curre, *People Incorporated*

Jenna French, *Shenandoah County*

Carrie Chenery, *Shenandoah Valley Partnership*

Mitch Moore, *Miles Davis Shenandoah University*

Christine Kriz, *Top of Virginia Regional Chamber of Commerce*

Christy Dunkle, *Town of Berryville*

Felicia Hart, *Town of Front Royal*

Marla Jones, *Warren County Economic Development Authority*

SET Participants & Affiliations

Mike Ashley, *Ashley's Car Wash/ Shenandoah County Chamber of Commerce*

Jim Possehl, Natalie Miller, *Blue Ridge Industries*

Len Capelli, *Clarke County*

Susan Ralis, *First Bank*

Robert Hess (NSVRC), Judy McCann-Slaughter, *Frederick County Board of Supervisors*

Patrick Barker, Wendy May, Sally Michaels, *Frederick County Economic Development Authority*

Kim Herbstritt, *Literacy Volunteers Winchester*

Karen Helm, Jim Kraft, Dale Maza, *Lord Fairfax Small Business Development Center*

Joan Comanor, *Lord Fairfax Soil and Water Conservation District*

Jeanian Clark, *Lord Fairfax Workforce Solutions*

Dennis Atwood, John Adamson, *Multi-Civic Organizations*

Joseph Dewald, *Navy Federal Credit Union*

Dennis Morris, Brandon Davis, David Cooper, Nicholas Robb, Amber Joiner-Hill, Stephanie Langton, *Northern Shenandoah Valley Regional Commission*

Stephanie Lillard, Amity Moler, *Page County*

Leslie Curre, *People Incorporated*

Jenna French, *Shenandoah County*

Cheri Wright, *Shenandoah County Chamber of Commerce*

Jon Sisler, *Preston Knight Shenandoah Valley Electric Cooperative*

Mary Brawn, *Shenandoah Valley Discovery Museum*

Kate Wofford, *Shenandoah Valley Network*

Bill Wiley (NSVRC), *Shockey, Winchester City Council*

Christine Kriz, *Top of Virginia Regional Chamber*

Christy Dunkle, *Gwendolyn Malone Town of Berryville*

Felicia Hart, *Town of Front Royal*

Brittany Clem, *Town of New Market*

Andrew Gouldin, *Union Bank*

Nadine Pottinga, *United Way of Northern Shenandoah Valley*

Kevin Callanan, *Valley Health System*

Joe Lehnen, *Virginia Department of Forestry*

Matthew McLaren, *Virginia Economic Development Partnership*

Donna Holloway, *Virginia Employment Commission*

Taryn Logan, Eric Dean Cook, Mary Alice Cook, *Warren County*

Marla Jones, *Warren County Economic Development Authority*

Greg Drescher, *Warren County Public Schools*

Justin Kerns, *Winchester/ Frederick County*

Appendix I: Public Comment

Below are the comments received on the draft CEDS document, open for comment from November 16, 2018 through December 16, 2018.

11/20/2018: Felicia Hart requested her name and title be added to the Project Team list. It was edited to include Felicia on 11/27/2018 and immediately reprinted and added to the website.

11/30/2018: John Crockett, Planner II at NSVRC suggested adding an objective to Goal 5: Environmental Resiliency to include maintaining a region-wide map library, designing training for GIS decision making, and offering courses quarterly. The language was implemented as suggested.

Suggested language:

GOAL AREA 5: HAZARD AWARENESS & ENVIRONMENTAL RESILIENCY

Develop and implement programs to increase the awareness of natural hazard mitigation efforts that target the public and local governments.

OBJECTIVE 5.4 Increase spatial awareness of region-wide physical, human and environmental geographic physiognomies.					
Task	Lead Stakeholder / Partners	Priority Level*	Funding Sources	Resources	Performance Measures
5.4.1 Develop and maintain inventory of meaningful and useful regional maps (interactive/static)	NSVRC, Local Planners, Local GIS Dept.	Med	Staff Time	HMP, WIIP, General Planning	Map/data updates, map/data requests
5.4.2 Design training for GIS decision making (economic, environmental, utility, health, EM, etc.)	NSVRC, Local Planners, Local GIS Dept., Utility Dept., Emergency Management Officials	Med	Staff Time	HMP, WIIP, General Planning	Number of attendees trained
5.4.3 Provide project specific GIS analysis	NSVRC, Local Planners, Local GIS Dept., Utility Dept., Emergency Management Officials, Project Managers, Engineering Dept.	Med	Staff Time	HMP, WIIP, General Planning	Map/data updates, map/data requests
5.4.4 Offer general GIS problem solving tools/programs/strategies	NSVRC, Local Planners, Local GIS Dept., Utility Dept., Emergency Management Officials, Project Managers, Engineering Dept.	Med	Staff Time	HMP, WIIP, General Planning	Map/data updates, map/data requests

12/06/2018: Chester Lauck, Frederick County Emergency Management noted that the document references "7,000 linear feet" of waterways in the region; the correct verbiage is "7,000 linear miles". The suggestion was verified and implemented the same day.

12/06/2018: Tracy Fitzsimmons, President Shenandoah University and Mitch Moore, Senior Vice President, Shenandoah University made the following suggestion:

"Under Goal 3, we recommend the addition of the following Objective and associated Tasks:

3.4 Partner with government, public schools, universities and colleges, and businesses to become an entrepreneurial region of innovative ideas and technologies capable of fulfilling future market demands.

3.4.1 Support the development of an incubator space and entrepreneurship programming in the region.

3.4.2 Support the creation of support networks for new startups, including mentorships that connect entrepreneurs with established business owners.

3.4.3 Involve local businesses and community leaders in mentoring area university students in business and entrepreneurship.

The new objective was incorporated immediately. On 12/12/2018 a follow up conversation was held with Marguerite Landenburger, Shenandoah University, to discuss the additional matrix items not included in the original suggestion: task stakeholders and partners, funding sources, and

resources. Those items were approved and implemented. On 12/13/2018 additional comment was received to further clarify the Action Plan Matrix

12/06/2018: Sally Michaels, Frederick County EDA, submitted a number of spelling and grammar corrections which were accepted and incorporated immediately. Suggestions were made regarding names and affiliations in Appendix H, and revisions were made to increase consistency. There were also additional comments on the following objectives and tasks:

1.5.6 Suggested using the language “English language learner” instead of “English as a second language”. This was accepted and implemented.

2.2.2 Expressed concern with bike traffic throughout the region. The language was reviewed with the regional bike and pedestrian planning subject matter expert, and changes were implemented to address the concern. A task was incorporated to educate both bicyclists and motorists on sharing roadways and bike safety.

3.1 Expressed concern that establishing a regional agriculture brokerage would be redundant to what the “Co-Op has already established”. After reviewing the status of this objective from the SET process with the task-leader from Virginia Cooperative Extension, it was confirmed that no work has been completed, and that all interested parties have been directed to the Dayton market until something is developed in this area. Establishing a regional brokerage is still a regional priority.