

GO VIRGINIA REGION 8: ECONOMIC GROWTH & DIVERSIFICATION PLAN AMENDMENT #2

Updated August 1, 2019

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Introduction

The purpose of this document (the Amendment) is to provide an update to the original Growth and Diversification Plan (G&D Plan) developed by Camoin Associates, and approved by the GO Virginia Region 8 Council in 2017. The information included in this Amendment is in keeping with the guidelines provided by the GO Virginia Board in March 2019, and complies with the requirement that regional G&D Plans be updated at least every two years.

This Amendment also offers a snapshot of recent activity in the region for each of the targeted industries; however, given the limited timeframe that has transpired since the launch of the GO Virginia program (i.e. just two years), significant results have not yet been realized. Thus, the Amendment is intended primarily as a revalidation of Region 8's targeted sectors and offers several defined strategies for enhancing the outcomes for achieving the goals of the Commonwealth's Growth and Opportunity Act.

About GO Virginia



To enhance, reinforce, and complement its existing economic assets, the Commonwealth of Virginia introduced an effort in 2016 to promote regional economic identity and cooperation. This effort, called the GO Virginia Initiative, is a collaboration designed to promote private-sector economic growth and diversification across the State of Virginia. Through the creation of nine economic development regions, GO Virginia will facilitate creation and targeting of new investment and innovation in high-income and export-oriented industry sectors. The nine regions, established in the spring of 2017, were directed to assess gaps in economic development resources in both an intraregional and interregional capacity, and successfully put forth potential projects that can fill these gaps with the aid of state funding.

The GO ("Growth & Opportunity") Virginia Initiative enables each region around Virginia to develop a deeper understanding of their current capacities. More importantly, the program offers a mechanism for partnering with area organizations, in order to find innovative solutions that allow local and regional groups to leverage their existing strengths to promote economic development. As described by the Virginia Department of Housing and Community Development (DHCD), the initiative "supports a voluntary, incentive-based approach as the best way to encourage regional cooperation on private-sector growth. To fund state incentives, the coalition favors use of growth revenues, re-purposed dollars, and efficiency savings...GO Virginia proposes NO new taxes, mandates, layers of government, or changes in local authority."

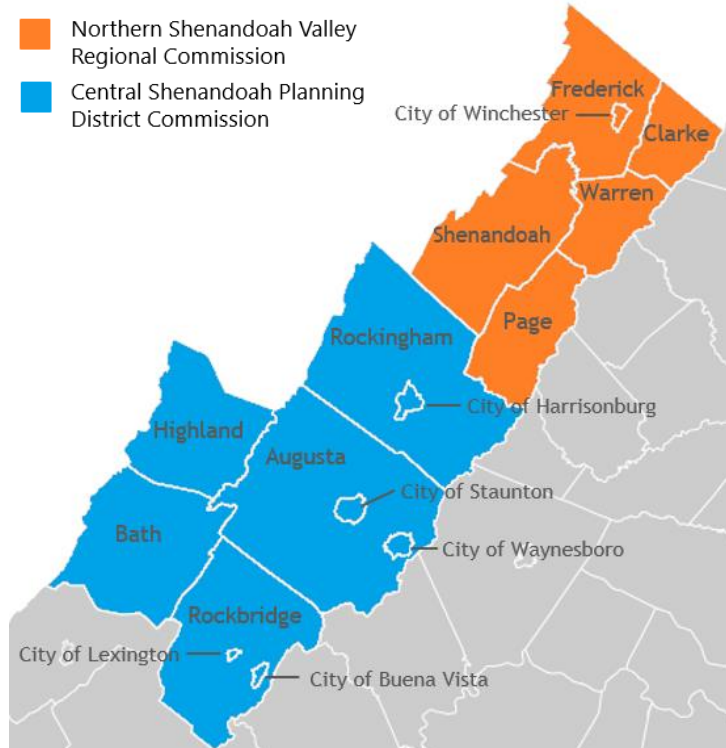
About Region 8

Region 8 is located in the Shenandoah Valley area of Virginia and is comprised of 16 localities, shown in the map to the right.

Region 8 is home to two planning district organizations: Central Shenandoah Planning District Commission (CSPDC) and the Northern Shenandoah Valley Regional Commission (NSVRC). The Central Shenandoah Planning District Commission is comprised of Rockingham County, City of Harrisonburg, Highland County, Augusta County, City of Staunton, City of Waynesboro, Bath County, Rockbridge County, City of Lexington, and City of Buena Vista. The Northern Shenandoah Valley Regional Commission is comprised of Frederick County, City of Winchester, Clarke County, Shenandoah County, Warren County and Page County.

Region 8 Localities

- Northern Shenandoah Valley Regional Commission
- Central Shenandoah Planning District Commission



The regional geography encompasses shining examples of American countryside in the Shenandoah National Park and George Washington & Jefferson National Forests, along with an abundance of historical properties, including the Woodrow Wilson Presidential Library Museum in Staunton.

While the area is divided into two separate planning districts, Region 8 is fortunate to be served by one single workforce development entity – the Shenandoah Valley Workforce Development Board (SVWDB). This structure facilitates the ability to address and implement effective workforce and talent attraction solutions in a coordinated or complimentary fashion, as may be required by the differing demographic profiles of the two planning districts.

As of 2018, the estimated population of Region 8 was 539,330 with a labor force participation rate of approximately 62%.



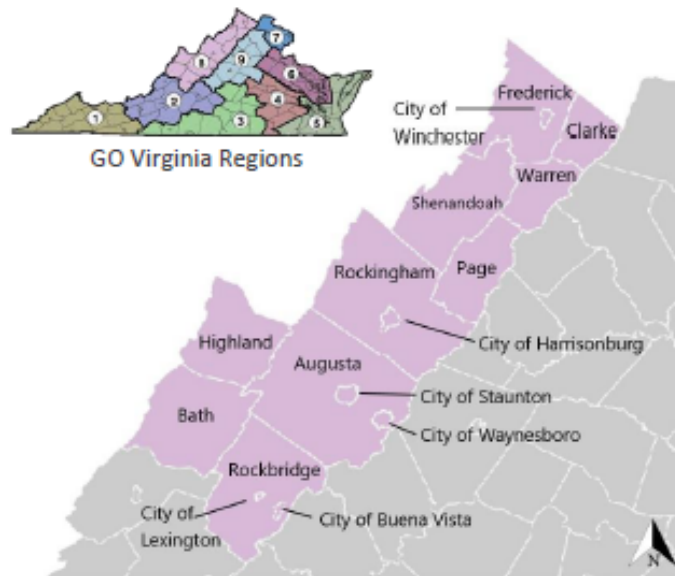
VIRGINIA INITIATIVE FOR
GROWTH & OPPORTUNITY
IN EACH REGION

GO VIRGINIA REGION 8

GO VIRGINIA MISSION

GO Virginia supports programs to create more high-paying jobs through incentivized collaboration between business, education, and government to diversify and strengthen the economy in every region of the Commonwealth.

After a successful planning process, Region 8 launched into acting on recommendations and fulfilling its Economic Growth and Diversification Plan.



7 Targeted Industries



Financial and
Business Services



Health Care



Value-Added Food
Manufacturing



Light
Manufacturing



Biomedical/Biotechnical



Transportation
and Logistics



IT/Communications

REGION 8 COUNCIL

The Region 8 Council is comprised of 28 members representing small and large businesses, higher education institutions, K – 12, local government and other valuable community stakeholders.

The Council meets quarterly, mirroring the State Board's calendar, to advance the Economic Growth and Diversification Plan and to consider the viability of project applications prior to recommending fundable projects to the State GO Virginia Board.

SUPPORT ORGANIZATIONS

Three existing organizations in the Shenandoah Valley administer the Region 8 GO Virginia initiative, provide staff support to the Regional Council and guide on-the-ground action during the implementation phase of GO Virginia.

- Northern Shenandoah Valley Regional Commission
info@nsvregion.org, (540) 636-8800
- Shenandoah Valley Partnership
svp@jmu.edu, (540) 568-3100
- Central Shenandoah Planning District Commission
cspdc@cspdc.org, (540) 885-5174

PROJECT APPLICATION AND IMPLEMENTATION PROCESS

The GO Virginia Region 8 Council accepts and approves proposals for projects to submit for funding through the Commonwealth's GO Virginia initiative.

PROJECT CRITERIA

- Aligns with Region 8's Economic Growth and Diversification Plan and Targeted Industry sectors
- Includes the collaboration of two or more localities
- Commits non-state sources of matching funds (50/50), including a required locality match of 20% or \$50,000, whichever is greater
- Creates private sector jobs that pay an annual wage greater than \$41,000
- Generates new spending in the Shenandoah Valley (not just recirculating local spending)

FUNDING AVAILABILITY

Region 8 Per Capita



Based on Region's population

Enhanced Capacity Building



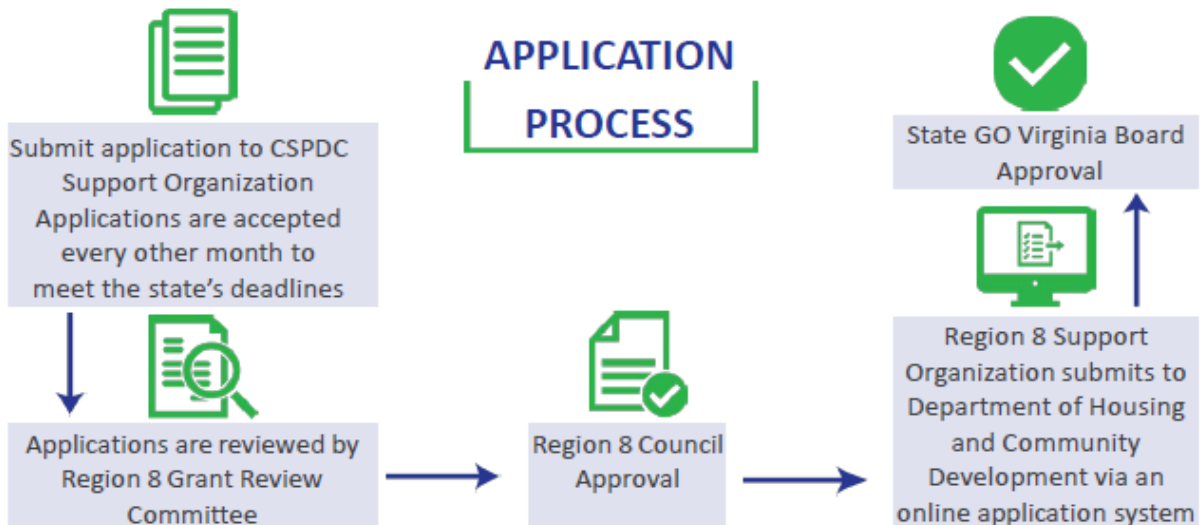
Pre-planning projects with expedited application process

State-wide Competitive



Projects where 2 or more GO Virginia regions partner

APPLICATION PROCESS



For more detailed information please visit: www.theShenandoahValley.com

Executive Overview

As in many regions, the launch of the GO Virginia initiative in Region 8 has precipitated some challenges during the first two years. Thankfully, as State guidance has been clarified and refined, the Region 8 Council has also developed more focus and understanding of the desired projects and outcomes of the Growth and Opportunity Act. Regardless, the Council's commitment and determination have remained steadfast, and support from the Region's business, community, and academic partners remains strong.

While Region 8 support staff have analyzed several key data points in preparing this document, this Amendment to the 2017 Growth and Diversification Plan is primarily focused on strategies and areas of opportunity to be pursued over the next two years. Many of these strategies and initiatives have evolved over the past year when the Region 8 Council hired a dedicated Program Director to oversee its GO Virginia efforts; however, while organization, coordination, and consultative services have been provided by the Program Director, the exciting concepts and anticipated proposals have been generated through many of the innovative and devoted partners across the Region. These priority projects are outlined later in this document in the Project Pipeline section.

With many of the metrics and data points either lagging behind or producing longer term outcomes, it is difficult to see measurable effects from these first two years. Nevertheless, a review of the data and recent activities across the region, through both GO Virginia and non-GO Virginia funding, reaffirm the targeted business sectors for Region 8:

- Financial and Business Services
- Health Care
- Information Technology/Communications
- Light Manufacturing
- Transportation and Logistics
- Biomedical/Biotechnical (added in 2018)
- Value-Added Food Manufacturing (added in 2018)

A detailed discussion of the Council's decision for maintaining the current targeted industries is provided later in this document.

The Region 8 Council has approved several grant requests since 2017, some of which are just starting to show results. Nevertheless, positive outcomes are anticipated from all of the approved projects and Council leadership has taken other steps to ensure future success of GO Virginia across the Region including:

- Hiring of the first Program Director
- Establishment of the Economic Development Ad Hoc Committee

- Creation of an Entrepreneurial Ecosystem Advisory Group
- Revamping/redefining the process for developing the project pipeline
- Enhancing stakeholder outreach and engagement

These and other actions are explained in more detail in the Successes To-Date section of this document.

Priorities for FY20-FY21

At its meeting on April 23, 2019, the Region 8 Council established priorities around each of the four GO Virginia frameworks. These priorities evolved through the newly defined project pipeline development process that was adopted by Council members in early 2019 (explained later in this document), and were based on project concepts and ideas generated through two regional “summits” held in March 2019. In turn, the Council has already identified their primary areas of focus and the associated projects they will support, as they consider these anticipated GO Virginia grant requests coming before them in the 2020 and 2021 fiscal years. Furthermore, it is presumed any subsequent grant requests will meet all of the GO Virginia requirements, and also have the support of the GO Virginia project team at the Department of Housing and Community Development.

The table below outlines the proposed project concept, framework, and the overall rank assigned by the Council when reviewing and prioritizing the potential projects for the coming fiscal year(s).

GO VA Framework	Project Name	Est. Grant Request
Business Scale-up:		
Priority #2-b	Shenandoah Valley Industrial Hemp Initiative	\$60,000 (Phase 1); \$400,000 (Phase 2)
Priority #7	The Business of Early Childhood Education Initiative**	\$100,000
Priority #5	SVP Economic Gardening Program	\$100,000
Site Development:		
Priority #1	Shenandoah Valley Aviation Park*	\$600,000-\$1 million
Priority #3-a	Shenandoah Valley Regional Business Park	\$20,000 (Phase 1)
Priority #4	SVP Tier 2 to Tier 3 Sites Advancement	\$250,000
Start-up / Entrepreneurial Ecosystem:		
Priority #2-a	Valley Emerging Technology Incubator (VETI)*	\$500,000

Priority #6	Feasibility Study: Agricultural Enterprise Center of VA*	\$90,000
Priority #8	SILI HubLabs - Phase 2*	\$300,000
Talent Pipeline/Workforce:		
Priority #2-c	Valley Talent Collaborative	\$2 million
Priority #3-b	The Workforce Model	\$150,000

* indicates project elements could meet multiple GO Virginia frameworks

** preliminary discussion with DHCD suggests GO Virginia criteria may be difficult to meet

The Council has stated their willingness to consider projects outside of the above list, should they be deemed more impactful than the established priorities. Otherwise, Region 8 expects to work with its many partners to advance the goals of GO Virginia and realize favorable outcomes over the next two years.

Successes To-Date

The Region 8 Council has approved five grant requests totaling \$927,800 since the start of the GO Virginia program in 2017. Although some of these projects are just starting to show results, positive contributions are anticipated from all of the approved projects over the next two years. Council leadership has also taken other steps to ensure future success of GO Virginia across the Region including:

- **Hiring of the first Program Director:** Faith McClintic, a 25-year practitioner of economic development and public finance, joined the Region 8 team in August 2018. With Faith's extensive experience at both local and state levels of Virginia government, Region 8 has added a proven and results-oriented professional to oversee, direct and offer guidance to the Region's many devoted and capable partners in advancing the GO Virginia program.
- **Establishment of the Economic Development Ad Hoc Committee:** Region 8 has organized a working group of regional and local economic developers from across the Valley to assist with formulation and implementation of proposed initiatives. The Committee, led by Robin Sullenberger – Region 8 Council member and retired leader of the Shenandoah Valley Partnership – meets three to four times a year to brainstorm and strategize new initiatives, vet collaborative opportunities, and offer "as needed" feedback to aid the Region 8 Council in its decision-making.
- **Creation of an Entrepreneurial Ecosystem Advisory Group:** As a first-step response to advancing the work completed by TEconomy, the Chairman of the Region 8 Council has assembled an advisory team to assist with development and execution of ideas to strengthen entrepreneurial resources and programs across the Shenandoah Valley. Comprised of representatives from area colleges, universities, co-working spaces, community foundations, innovation hubs, angel investors, local tech-centric entrepreneurs, and the Virginia Small Business Development Center network, the Advisory Group generally meets on a monthly basis. Its initial work has been focused on doing a "deep dive" of the Region's strengths and weaknesses to identify critical gaps in the entrepreneurial infrastructure needed to grow and sustain both start-up and scale-up activities across the Valley. A more in-depth discussion of the Advisory Group's purpose and goals is further outlined in the Entrepreneurial Ecosystem Initiatives section of this document.
- **Revamping/redefining the process for developing the project pipeline:** Like other regional councils, the ideation of GO Virginia projects for Region 8 was not well thought out or particularly strategic over the first two years of the Program. As such, the Region 8 Council embraced and implemented a new process in early 2019, allowing Council members to define and prioritize their support and funding of projects across all four GO Virginia frameworks. While details of the new pipeline development process are outlined later in this document, Council can better ensure that forthcoming grant requests will be clearly aligned and well-coordinated with the primary goals of the GO Virginia program in the coming years.
- **Enhancing Stakeholder Outreach and Engagement:** The Region 8 Council understands and recognizes the importance of support and participation from both public and private

partners to ensuring success of the GO Virginia program. Thus, it is continually seeking ways to solicit input and enhance awareness of GO Virginia through a variety of efforts. Over the past two years, these efforts have included:

- rotating the location of each quarterly meeting around the Region;
- inviting local leaders from nearby localities, in which the Region 8 Council meeting is being held, to attend;
- periodic meetings of the Economic Development (“ED”) Ad Hoc Committee with representation from all 16 Region 8 localities and the Shenandoah Valley Partnership (mentioned above);
- participation from area non-profits, colleges and universities, business support organizations, local economic development offices, and local entrepreneurs in the Entrepreneurial Ecosystem Advisory Group;
- inviting local and regional partners (public and private) to the Region 8 Summits to participate in the pipeline development process.

Since the start of the GO Virginia program in 2017, two projects approved for funding are starting to yield results and are discussed below.

Cyber Security Workforce Development and Jobs Program – Blue Ridge Community College (BRCC) was awarded a GO Virginia per capita grant in 2018, allowing it to create a cyber security training program to facilitate job opportunities in this field in Region 8. The cities of Waynesboro and Harrisonburg are the partnering localities. Enrolled students receive the Security+ credential, participate in additional cyber security training through the Cybrary online platform, and experience hands-on training through internship placements with regional employers in the cyber security industry. Two cohorts of twelve students each have enrolled in the program. Those in the first cohort are anticipated to complete Security+ exams in the summer 2019. The second cohort is progressing through the training program. Over a two-year time period, fifty students will be trained and placed in these high-demand cyber security jobs with an average annual salary of \$53,641. BRCC has already received over 140 applications for this program since it was launched in the summer of 2018.

Rockbridge Area Advanced Manufacturing Project (RAAMP) – Byers Technical Institute (BTI), a new technical training center in Rockbridge County, partnered with the City of Buena Vista and the Rockbridge County Economic Development Authority to produce a pipeline of skilled welders for manufacturing companies throughout Region 8. BTI offers a 40-week advanced welding program to prepare students to enter the welding field at the Journeyman level. A GO Virginia grant is supporting the expansion of this program by providing funding for instructors and training equipment. RAAMP expects to graduate 72 welders from the program over a 5-year period at an average annual wage of \$42,500. As of April 2019, 32 students have received the related industry credentials/certifications and 100 percent of students completing the full program thus far have been employed.

The status of all GO Virginia projects currently under contract in Region 8 are now being reported to Council on a quarterly basis. This report is outlined in Appendix 2.

Baseline Data Updates & Framework-Related Metrics

Since the development and approval of the original Growth and Diversification Plan for Region 8 in late 2017, only two projects have been launched over the past 12-15 months; therefore, it is difficult to see direct results from these initiatives in baseline data, particularly since the majority of the associated metrics lag behind. Nevertheless, Jobs EQ was used to produce reports of historical activity over the past two years, as well as five-year forecasts of industry growth and employment projections for Region 8 based on the relevant 4-digit NAICS codes. All of the detailed data tables are provided in Appendix 1, although key data points are highlighted below.

Key Metrics – GO Virginia Region 8

Total Employment – All Industries 2019Q1: 240,574

Total Employment – Target Industries 2019Q1: 97,955

Average Annual Wages – All Industries 2019Q1: \$41,052

Average Annual Wages – Target Industries 2019Q1: \$48,080

Average Annual Wage Growth 2017Q1-2019Q1 – All Industries: 4.9%

Employment Growth – Region 8 Targeted Industries

NAICS	Industry	Current		2-Year History		5-Year Forecast	
		Four Quarters Ending with 2019Q1		Total Change	Avg Ann % Chg in Empl	Growth	
			Avg Ann Wages	Empl	Region	Empl	Avg Ann Rates
4238	Light Manufacturing	20,266	\$47,597	244	0.60%	-688	-0.70%
3113	Transportation & Logistics	13,892	\$48,242	659	2.50%	883	1.20%
3114	Biomedical/Biotechnical	2,638	\$77,709	172	3.40%	14	0.10%
3121	Finance & Business Services	18,913	\$52,730	598	1.60%	505	0.50%
1110	Healthcare	32,947	\$47,368	609	0.90%	2,535	1.50%
4249	Info Tech/Communications	5,070	\$67,771	303	3.10%	148	0.60%
3118	Value-Added Food Mfg	22,128	\$41,420	382	0.90%	739	0.70%

Source: JobsEQ®

Data as of 2019Q1

Sector-based, clustering activity can be seen in the number of establishments in each of Region 8's target industries.

	GO Virginia Region 8	GO Virginia Region 8
Industry	Establishments 2018 Q3	Establishments 2016 Q3
Information Technology and Communications	550	555
Biomedical/Biotechnical	107	109
Finance and Business Service	2,126	2124
Health Care	2,903	3212
Light Manufacturing	440	415
Transportation and Logistics	642	625
Value-Added Food Manufacturing	290	284
Total Establishments - Target Sectors:	7,058	7,324
<i>Source: JobsEQ®</i>		

Framework-Related Metrics

Talent Development: Region 8's Community Colleges play an integral role in workforce training and development activities. The tables below demonstrate their success in industry-based credentialing programs.

2021 Credentials Program		Preliminary AY 2018-2019		
	Targets for Complete 2021 Credentials	Total Complete 2021 Credentials 4/26/2019	Industry Certifications & Licensures 4/26/2019	Total Credit Degrees & Certificates (Final)
Blue Ridge Community College	2853	963	483	480
Lord Fairfax Community College	4044	1471	875	596
Dabney Lancaster Community College	543	266	224	42
Total - Region 8 Community Colleges:	7440	2700	1582	1118

2021 Credentials Program		Preliminary AY 2017-2018		
		Total Complete 2021 Credentials 4/26/2019	Industry Certifications & Licensures 4/26/2019	Total Credit Degrees & Certificates (Final)
Blue Ridge Community College		2083	907	1131
Lord Fairfax Community College		2523	1104	1419
Dabney Lancaster Community College		629	307	322
Total - Region 8 Community Colleges:		5235	2318	2872

2021 Credentials Program		AY 2016-2017		
		Total Complete 2021 Credentials (Final)	Industry Certifications & Licensures (Final)	Total Credit Degrees & Certificates (Final)
Blue Ridge Community College		2105	1126	979
Lord Fairfax Community College		2726	1020	1706
Dabney Lancaster Community College		977	601	376
Total - Region 8 Community Colleges:		5808	2747	3061

Other workforce development programs are underway in Region 8, with most including an internship or apprenticeship component. These initiatives, including the expected placements in work-based learning opportunities, are discussed in the Workforce and Talent Gaps section of this document.

A detailed breakdown of credentials and licenses, by program, is included in Appendix 1 for each community college in Region 8.

Start-Ups: Entrepreneurial activities and new business ventures are a key component of every economy. This is especially true in rural areas where communities may not be well-positioned to attract and support large industries. As such, key resources and a strong entrepreneurial ecosystem must be in place to ensure innovation, vibrancy and growth of the region. Assessment of the start-up and related ecosystem activity, completed by TEconomy in December 2018, provides several important measures for Region 8.

Major Industry Cluster***	Number of Startups in Cluster	Number of High Growth Start-ups in Cluster**	Start-up Employment Levels, 2017	Start-ups Industry Cluster Employment Concent. Index*
Agriculture & Food Processing	426	13	1,137	2.87
Business Services	1,142	66	2,422	0.75
Energy, Natural Res., & Finished Products	164	22	768	1.69
Engineering, R&D, Testing & Tech Svcs	107	11	323	0.46
Financial & Insurance Services	336	8	460	0.64
Health Care Services	51	6	316	0.42
Information Tech/Comm. Services	106	18	393	0.38
Life Sciences	75	3	153	0.55
Manufacturing	132	17	818	1.57
Ship Building, Aerospace, & Defense	2	0	8	0.09
Transportation, Distrib. & Logistics	503	50	1,871	1.17

(Source: 2018 TEconomy Report)

Other key indicators of business start-up activity noted by TEconomy include:

- ⇒ New Business Formations (2010-2017): 1677
- ⇒ Total Patents Awarded (2017): 125
- ⇒ SBIR/STTR Awards & Amounts (2010-2017): 12 awards - \$2.54 million awarded
- ⇒ Venture Capital Activity (2010 – 2017): 20 deals totaling \$41.8 million

Scale-Ups: Another essential component of a dynamic and stable economy is an environment in which company growth and profitability is fostered beyond the start-up phase. The ability for businesses to scale-up and increase their employment base, in turn, helps to build industry clusters and create synergies across the region. Thus, TEconomy's work also considered the longer-term viability of start-up businesses across Region 8. The study found that the cumulative 10-year survival rate for startups in Region 8 of 55.2% exceeds that of the Statewide rate of 53.5%, suggesting solid scale-up potential.

Founding Year of Startup Cohort*	Number of Startups in Traded Sector Industries	Number of Startups Surviving by 2017
2007	204	67
2008	239	75
2009	100	32
2010	269	100
2011	141	59
2012	235	120
2013	247	130
2014	197	123
2015	236	166
2016	189	163
2017	163	163

(Source: 2018 TEconomy Report)

Scale-up activity across the Shenandoah Valley can also be seen in the expansions of numerous companies in the Region's target industries, along with the significant infrastructure investments that will support these industries in the years ahead. The list below outlines business expansions or announced commitments from 2017-2019 (YTD) across Region 8. Collectively, they represent over \$2.2 billion of investment and more than 1,800 jobs for the regional economy.

Business/ Government	Priority Industry Sector	Region 8 Location	Capital Investment	New Employees
Speyside Bourbon-Stave Mill	Food and Beverage	Bath	\$0.114 million	45
Career Builder	IT/Telecommunications	Frederick	\$2.5 million	250
RPC Superfos	Light Manufacturing	Frederick	\$9.7 million	35
Mercury Paper	Light Manufacturing	Strasburg	\$17.2 million	73
O'Sullivan Films	Light Manufacturing	Winchester	\$10.3 million	61
NIBCO of Virginia	Light Manufacturing	Stuarts Draft (Augusta)	\$14 million	30
ComSonics	Light Manufacturing	Weyers Cave (Augusta)	\$.6 million	34
Provides US	Light Manufacturing	Verona (Augusta)	\$.9 million	20
Hermitage Hill Farm & Stables	Food and Beverage	Augusta	\$0.5 million	7
M&H Plastics	Light Manufacturing	Frederick	\$12 million	157
Dynovis	Light Manufacturing	Fairfield (Rockbridge)	\$.6 million	44
Mohawk Industries	Light Manufacturing	Rockbridge	\$10 million	15
Sumitomo Machinery	Light Manufacturing	Verona (Augusta)	\$2.5 million	34
Merck	*1 Bio-Technology	Elkton (Rockingham)	\$1 billion	100
Hershey	Food and Beverage	Stuarts Draft (Augusta)	\$104 million	65
Shenandoah Growers	Food and Beverage	Rockingham	\$100 million	200
Old Hill Cidery	Food and Beverage	Rockingham	\$0.5 million	5
Shenandoah Valley Organics	Food and Beverage	Harrisonburg	\$2 million	30
Packaging Corp of America	Light Manufacturing	Harrisonburg	\$35.3 million	0
RainCrow Studios	IT/Telecommunications	Harrisonburg	\$1.5 million	9
Shentel	*2 IT/Telecommunications	Harrisonburg	\$19 million	8
Shentel	*2 IT/Telecommunications	Staunton	\$12 million	6
Shentel	*2 IT/Telecommunications	Winchester	\$9 million	6
Interchange	Transportation & Logistics	Rockingham	\$41.6 million	88
Commonwealth of VA	*3 Transportation & Logistics	Reg. 8 1-81 Corridor	\$838.1 million	500
Totals:			\$2.243 million	1,822

***Notes:**

1. BRCC and JMU, both members of the GOVA Region 8 Council, are collaborating to address Merck's short- and long-term workforce needs through the development of a custom workforce solution. BRCC and JMU will establish a pipeline of bio-technology engineering and computer science talent to support the future growth of Merck.
2. Shentel, a member of the GOVA Region 8 Council, will provide Harrisonburg, Staunton and Winchester high speed fiber-to-the-home internet service. This technology will help strengthen the region's entrepreneurial ecosystem.
3. Members of the GOVA Region 8 Council formed the I-81 Federation and successfully lobbied for I-81 improvements.

Site Development:

Over the past two years, the Region 8 Council has encouraged member localities to proactively address the growing shortage of "ready sites" across the Shenandoah Valley. Subsequently, the Region's ED Ad Hoc Committee has cooperatively undertaken some important steps to identify and enhance site preparation, beginning with site characterization work.

In 2018, the local economic development organizations jointly hired and funded Draper Aden Associates to evaluate and characterize 25 sites around the Region. While parcel sizes varied between localities, most were larger than 25 acres. Regardless, the outcome of this site characterization work follows the criteria of the Virginia Business Ready Sites Program (VBRSP), and will allow localities to better prepare their sites for the desired development activities. In addition, the characterization work will be instrumental in identifying potential properties for the Shenandoah Valley Regional Business Park initiative prioritized by the Region 8 Council through the Pipeline Development Process in April 2019. The report of these site evaluations is provided in Appendix 1.

In addition to the site characterization work collectively undertaken by Region 8 localities, the Virginia Economic Development Partnership's (VEDP) site database (Virginia Scan) included 49 sites, most of which are part of the characterization work currently underway at VEDP.

Region 8 Sites >25 acres in VEDP's VA Scan @ June 2019		
VBRSP Tier	# of Sites	Total Acreage
4	2	670
3	1	170
2	19	4394
1	4	738
UC	23	2877
TOTAL:	49	8849
UC: uncharacterized sites		

Regional Non-GO Virginia Programs & Activities

Below is a list of regional efforts to diversify and grow and/or retain higher paying jobs and to enhance access to such jobs.

Augusta County Shovel Ready Program

Currently in the design and conception phase, the Shovel Ready Program is a local grant program envisioned by Augusta County to encourage private property owners to invest in due diligence and site readiness. Types of jobs that could potentially benefit from this program include manufacturing, value-added agriculture, and life sciences.

Bath-Highland Broadband Authority

Reliable high-speed internet access is now essential for businesses, education, healthcare, emergency services, and the daily activities of local residents. In response to this need, the Bath-Highland Network Authority was created in 2017 “to seek broadband solutions and funding opportunities for the counties of Bath and Highland.” The Authority is made up of representatives from Bath County, Highland County, and the Town of Monterey, and held its first organizational meeting in January 2019. The Authority is seeking both planning and implementation funds through the Virginia Telecommunications Initiative (VATI).

Buena Vista CDBG Planning Grants

The City of Buena Vista has applied for and received a total of \$50,000 in CDBG planning grants for both a Business District Revitalization Planning Grant to support downtown revitalization efforts and planning, along with an Opportunity Zone planning grant to support overall economic development efforts in the City.

This effort will target downtown businesses/business owners and entrepreneurial jobs, along with supporting traditional industrial jobs within the City for low to moderate income individuals.

The City of Buena Vista is being assisted by the Central Shenandoah Planning District Commission (CSPDC) and the Department of Housing and Community Development (DHCD), with support from the Regional Chamber of Commerce, Regional Tourism, and other budding citizen groups.

Buena Vista Industrial Park

Columbia Gas of Virginia will be building a MOD site as the first tenant in the Buena Vista Industrial Park. The project is scheduled to be completed by December 2019. This project will allow Buena Vista to build needed infrastructure into the industrial park, including an access road to the site funded, in part, by VDOT Economic Development Access Funds and supported by VEDP.

Having critical infrastructure in place will allow for the remaining 25 acres of the Park to be marketed more strategically and more successfully, which could potentially include future jobs of all kinds.

Connect 340

With funds provided through a USDA REDI grant, this project is a regional effort of three rural communities, bordering national public lands. These localities have organized a team to study the positive impacts of outdoor recreation as a rural economic development strategy and community identity. The project outlines two main priorities; Priority 1: To identify gateway opportunities, create a plan that supports a regional tourism outdoor rec brand, and encourage entrepreneurial development that can be managed and promoted by a separate non-profit or foundation. Priority 2: Increase consumer spending and create jobs in outdoor recreation to help diversify the economy, improve quality of life, and strengthen community well-being.

This project will also encourage entrepreneurial and light manufacturing development. Project partners include Page County, Front Royal, Rockingham County, Shenandoah National Park, Luray Caverns, and Massanutten Resort.

Goshen Rural Broadband Project

BARC Electric Cooperative has applied for a \$1M matching grant to the Appalachian Regional Commission through their PowerPlus grant program. The funds would be used to deploy a gigabit last-mile Fiber-to-the-premise (Ftth) network to the businesses and residents of the Town of Goshen, providing critical infrastructure that does not currently exist. Businesses, schools, public services, first responders, residents and government agencies will all have access to high-speed internet through this project. BARC Electric is collaborating on this project with Rockbridge County Government, the Rockbridge County Economic Development Authority, and the Town of Goshen. The Central Shenandoah Planning District Commission will administer the grant, if awarded. In addition to these entities, BARC is working with businesses located in Goshen that are seeking reliable broadband, including Boy Scouts of America National Capital Area Council, The Hummingbird Inn and Northfork Lumber, Inc.

Harrisonburg – Gigabit City Project

Shentel is in the planning stage to launch gigabit internet in the City of Harrisonburg. The project includes internet, video and phone. Gigabit internet provides a benefit to residential customers, the private sector, and to institutional users (distance learning tool, tele-health tool). The project is expected to be completed by year end 2020 and will target technology companies, defense contractors, and healthcare companies.

I-81 Improvement Program

In April 2019, the General Assembly approved the I-81 Improvement Program and Improvement Fund, including the creation of a 15-member I-81 Advisory Committee to the Commonwealth Transportation Board (CTB). The approved I-81 Program will generate \$151 million per year in new revenue for improvements to I-81, through increased tractor-trailer registration fees and road taxes that trucks pay to travel the corridor, increases in the state diesel tax, and an increase in the wholesale motor fuels tax along the I-81 corridor. With passage of the programming and funding bills, the State will be able to issue bonds and prioritize I-81 Improvement Plan projects for

construction. The five Planning District Commission Chairs from the I-81 Corridor will serve on the Advisory Committee, which will make project priority recommendations to the CTB. The chairs of the CSPDC and NSVRC also serve on the GO Virginia Region 8 Council.

Lord Fairfax Community College (LFCC) Recreation and Outdoor Leadership Advisory Board

Lord Fairfax Community College and all outdoor tourism-related businesses in Front Royal and Warren County have organized to promote outdoor recreation in the area, and to work with outdoor/recreation businesses regarding their needs and talent pool. The types of jobs range from outdoor water guides to park rangers/tour guides. Partnering entities include LFCC and the Town of Front Royal and Warren County.

Merck & Co. Expansion

Merck & Co., Inc., a publicly held global healthcare company known as MSD outside the United States and Canada, plans to invest up to \$1 billion in stages over the next three years to expand its manufacturing operation in Rockingham County. The company will add 120,000 square feet to its existing 1.1 million-square-foot operation in Elkton, Virginia to increase production of its Human Papillomavirus (HPV) vaccines. Virginia successfully competed with other states for the project, which is anticipated to create approximately 100 new jobs.

As part of the expansion, Blue Ridge Community College (BRCC) and James Madison University (JMU) will collaborate to address Merck's short- and long-term workforce needs through the development of a custom workforce solution. BRCC and JMU will establish a pipeline of biotechnology engineering and computer science talent that will allow the Shenandoah Valley to accommodate the future growth of Merck and other life science industries and manufacturers in the region.

Organizations involved include Merck & Co., Rockingham County, Shenandoah Valley Partnership, Blue Ridge Community College, James Madison University, and the Virginia Economic Development Partnership.

Page County HUB Zone Development

Page County Economic Development, in collaboration with the Small Business Administration and Northern Shenandoah Valley Regional Commission, is working to attract and match HUBZone businesses to the local workforce, as well as up-skill and certify workforce for HUBZone businesses. HUBZone businesses must employ 35% of their workforce in a HUBZone area.

Rockbridge Area REDI Project

Rockbridge County was one of 47 communities across the United States to receive technical assistance through USDA's Rural Economic Development Innovation (REDI) program. The County,

along with the cities of Buena Vista and Lexington, will receive free technical assistance for up to two years to help them create and implement long-term economic development plans. Specifically, the assistance will help them plan for the expansion of water, waste, electric and housing infrastructure. Assistance will help support the rural workforce through apprenticeship programs, small business succession planning, small business assistance, and entrepreneurship support and telework strategies.

The program will target entrepreneurs, trades, and service industry jobs and will bring together the three local governments, Chamber of Commerce, three local universities and a community college, as well as several local businesses.

Shenandoah County Business Park Brownfields

Shenandoah County is applying for a Brownfields Remediation Grant through the Virginia Department of Environmental Quality (DEQ), to complete the phase 2 environmental survey on lot 1A of the Northern Shenandoah Business Park in Strasburg. If awarded, the next step would be to submit a future application for any necessary remediation. The hope is to also apply for a Brownfields Grant through the EPA in 2020, to identify the Route 11 Corridor through Shenandoah County as a priority.

Shenandoah County Economic Development is working with the Town of Strasburg, Shenandoah County Industrial Development Authority, and Draper Aden Associates on this program. Targeted job areas will include manufacturing, call centers, and food manufacturing.

Shenandoah Valley Airport Hangar Project

The Shenandoah Valley Regional Airport Commission intends to build additional infrastructure related to and involving aircraft hangars and office facilities to support the expansion of technology and aviation-related firms at the Shenandoah Valley Regional Airport (SHD). The project will enhance an existing site that has been targeted for this type of development, and it builds upon prior site improvements that completed significant grading and constructed an access taxiway into the area. The hangar project involves additional road and taxiway access, utility relocation/upgrades, and hangar/office construction. Upon completion of the project, there will be approximately 20,000 sq. ft. of aircraft hangar/office facilities with the ability to quickly construct similar facilities as firms choose to locate or expand at SHD.

Partnering organizations include the Shenandoah Valley Regional Airport Commission, the cities of Staunton, Waynesboro, Harrisonburg, and the counties of Augusta and Rockingham.

Shenandoah Valley Industrial Hemp Project

Various organizations throughout the Shenandoah Valley are working together to create a strategic plan for growing, harvesting, and processing industrial hemp in the Valley. Organizations involved include the Northern Shenandoah Valley Regional Commission, Central Shenandoah Planning District Commission, Shenandoah Valley Partnership, Page County Tourism and Economic Development, Shenandoah County Tourism and Economic Development, Augusta County Economic Development, and Rockingham County Economic Development.

This plan will include a regional effort from participating counties that will contribute a network of assets to the development and growth of industrial hemp in the region. The goal would be to identify a supply chain that would involve a series of initiatives needed to get hemp to the customer. The steps include growing, harvesting, processing the industrial hemp into a finished product, transporting those products, and distributing them to the end user. Understanding this process and identifying which communities can contribute to the supply chain will be the purpose of a potential planning grant.

The types of jobs being targeted include the entities involved in the supply chain, including growers, producers, vendors, warehouse workers, transportation companies, distribution centers, and retailers from all areas of the region. GO Virginia funding may be pursued for part of this effort.

Staunton- Augusta-Waynesboro Wage and Benefit Survey

Led by the Greater Augusta Chamber of Commerce and sponsored by the three jurisdictions of Staunton, Waynesboro, and Augusta County, as well as private businesses, the Chamber recently conducted a wage and benefit survey of the area. The final report has been made available on the Chamber website and other sites.

Staunton Crossing Brownfields and Demolition Project

The City of Staunton received a \$431,200 grant award through the Virginia Brownfields Restoration and Economic Redevelopment Fund (VBAF) for the Staunton Crossing Development. The grant funds will support the removal and disposal of hazardous materials at the former Western State Hospital property on Richmond Avenue, a critical step in preparing the development for potential investors. The City continues its efforts to make Staunton Crossing more marketable for economic development, including implementation of a plan to demolish 19 vacant, dilapidated structures on the site. The City has appropriated \$2 million towards the demolition project. The grant will fill a financing gap for the restoration and redevelopment of Staunton Crossing and help the City make further progress in bringing new business to Staunton. Coupled with the demolition of buildings scheduled to begin on the property in September 2019, these are significant measures to make the site more appealing to possible developers who want to take advantage of this prime location.

Combining past planning with new analysis, the City hired Timmons Group to develop an overall business plan for the Staunton Crossing site. This business plan includes a conceptual plan, along with the accompanying infrastructure analysis, financial analysis, and marketing strategies for the site.

This plan achieves a balance of economic development through a mix of advanced manufacturing, office and office/flex, and data center uses. The plan assumes several significant businesses creating a projected 3,250 jobs at full buildout.

Organizations working together on this effort include the Staunton City Council, Staunton Economic Development Authority, Virginia Economic Development Partnership, Draper Aden, and Timmons Group.

Staunton Crossing Way Road Extension Project

The City of Staunton was awarded \$8.7 million through the VDOT SmartScale program to extend Crossing Way through Staunton Crossing to connect to Valley Center Drive. This project will provide a new alignment with two connections to the existing transportation network to support planned economic development. The project will include 3,960 linear feet of a new roadway, installation of a roundabout, and the construction of a 100-space park and ride facility and transit stop, an electric car charging station, and bus shelter for BRITE and the Virginia Breeze.

Staunton VIDA Program

The City of Staunton received a \$200,000 grant award for a Virginia Individual Development Accounts (VIDA) program administered by the Virginia Department of Housing and Community Development (DHCD). Typically, VIDA savings and match may be used for post-secondary education or job training, homeownership, or to start a small business. The Staunton Creative Community Fund (SCCF), on behalf of the City, will be the VIDA Intermediary for the program.

SCCF will offer programs and services to entrepreneurs who want to start, strengthen or expand home-based or small businesses. Services include training, technical assistance and business counseling, access to capital, networking and mentoring, and computer and internet access. VIDA participants who are saving to invest in a microenterprise will be required to complete the Business Planning course offered by SCCF or a partner organization and to work with a business counselor to implement their plan.

Organizations involved in this program include Staunton City Council, Staunton Creative Community Fund, and the Virginia Department of Housing and Community Development.

Staunton West End Opportunity Zone Program

The City of Staunton Opportunity Zones program incentivizes investors to develop areas in need of revitalization by deferring federal taxes and reducing tax payments. This new incentive is for entrepreneurs to invest in the western portion of Staunton. The City selected the West End as a top priority for the Opportunity Zone program.

Reinvesting in properties in this area will increase local tax bases, facilitates job growth, and utilize existing infrastructure which takes development pressures off of other undeveloped areas of the City.

Those working together on this effort include the Staunton City Council, Staunton Economic Development Authority, and Staunton Creative Community Fund.

Waynesboro Nature's Crossing Technology Center

The City of Waynesboro is continuing development of the 170-acre industrial park known as Nature's Crossing Technology Center (NCTC). Water and waste water design has been completed

as part of the Virginia Business Ready Sites Program. The VDOT “Southern Corridor” road project, which will be the main access road within NCTC, is on schedule with design work. It is scheduled to be completed in 2023.

Targeted Business Sectors & Clusters

Region 8's targeted industries have expanded since approval of the original Economic Growth and Diversification Plan in 2017. The initial plan identified the following five targeted industries:

- Financial and Business Services
- Health Care
- Information Technology/Communications
- Light Manufacturing
- Transportation and Logistics

These sectors were chosen because they demonstrated strong employment growth, had high earnings potential for workers, and were export-oriented; thus, they correlated directly to the goals of GO Virginia.

In the spring of 2018, the Region 8 Council re-evaluated its five targeted industries to determine if any other sectors should be considered to promote and support transformative projects in the region. The consultant that prepared the original plan, Camoin Associates, was asked to conduct a comprehensive review of the data from the Region 8 Economic Growth and Diversification Plan. This review included analyzing historic and projected growth in jobs, regional average wages, GO Virginia requirements, and conversations with key stakeholders.

The Region 8 Council thoroughly considered this background data, along with regional context, and confirmed the addition of two other targeted industries: Value-Added Food Manufacturing and Biomedical/Biotechnical. The Region 8 Council believed that these additional target industries would encourage a range of projects that could be funded through GO Virginia, thereby stimulating vital sectors within our regional economy. The addition of the two targeted industries was unanimously approved by the Region 8 Council at its June 27, 2018 meeting, and submitted to DHCD staff for administrative review and approval. The Region 8 Economic Growth and Diversification Plan now reflects seven targeted industries as listed below:

- Biomedical/Biotechnical
- Financial and Business Services
- Health Care
- Information Technology/Communications
- Light Manufacturing
- Transportation and Logistics
- Value-Added Food Manufacturing

With the exception of Health Care, these sectors continue to align with the goals of GO Virginia and also consist of industries that are already strong in Region 8. The selected targets also allow the region to promote and build upon several key assets including economic base, skilled

workforce, available infrastructure, innovation, and entrepreneurship. While Region 8's economy is already quite diversified, it needs to grow and offer greater opportunities to expand supply chains for each of the targeted sectors.

Changes in Each Sector from Current Plan

Based on analysis of JobsEQ data for each of the current target sectors, the 2019 Economic Growth and Diversification Plan for Region 8 will continue to focus on the same seven targeted industries, including Health Care. Although the Region 8 Council understands that health care projects are not eligible for GO Virginia funding, the Council continues to recognize the significant influence of the Health Care sector on the region's economy. In addition, the opportunity for regional collaboration to address the demand for health care services, and to attract and retain talent in the region to provide those services, is still in keeping with the GO Virginia "model."

Overall, total employment in all industries increased by 4,195 jobs, or 1.8%, over the last two years. Employment growth in the Region's seven targeted industries exceeded this and, together, they increased by 2.3%. All seven targeted industries reported an increase in jobs. Below is a table summarizing employment trends followed by a more detailed description of changes by sector.

Region 8 Employment Trends 2017-2024

Sector	2017 Employment	2019 Employment	2024 Projected Employment
Biomedical/Biotechnical	2,466	2,638	2,652
Financial and Business Services	18,315	18,913	19,418
Health Care	32,338	32,947	35,482
IT/ Communications	4,767	5,070	5,218
Light Manufacturing	20,022	20,266	19,578
Transportation and Logistics	13,233	13,892	14,775
Value-Added Food Manufacturing	21,746	22,128	22,867
Total – Targeted Industries*	95,847	98,019	101,518
Total – All Industries	236,379	240,574	247,652

Source: JobsEQ, 2019 Q1

*Employment for Total-Targeted Industries does not equal total of the seven sectors as some NAICS codes are included under more than one sector.

Biomedical/Biotechnical

The Region 8 Council amended the Economic Growth and Diversification Plan in 2018 to add this sector which merges research, development, and the manufacturing of medical equipment with the production of pharmaceutical drugs. Region 8 currently has 107 establishments that employ 2,466 workers, with average earnings of \$77,709. The top industry in this cluster is Pharmaceutical and Medicine Manufacturing (NAICS 3254) with a location quotient (LQ) of 2.27. This subsector employs 40% of workers in the Biomedical/Biotechnical industry in the region.

In May 2019, Merck & Company announced a \$1 billion expansion of its Elkton facility in Rockingham County, along with the planned addition of 100 new jobs. With this one announcement of 100 jobs, Region 8 has already exceeded the 5-year employment forecast in the table above. As part of Merck's plan to hire additional employees, the pharmaceutical company also announced a collaboration with James Madison University and Blue Ridge Community College to train workers for critical positions. The partnership is aimed at addressing short- and long-term employment needs at the company. BRCC and JMU will establish a pipeline of biotechnology engineering and computer science talent that will allow the Shenandoah Valley to accommodate the future growth of Merck and other life science industries and manufacturers in the region.

The Biomedical/Biotechnical sector will continue to be supported by the Region's colleges and universities that have strong programs in health innovation, including the sectors of pharmacy, chemistry, and biology. A primary example is Blue Ridge Community College's newly constructed bioscience building, scheduled to open for the 2019 fall semester. The facility will feature a bioscience-oriented manufacturing lab designed to replicate and provide instruction in the rigid requirements of an FDA-validated bio manufacturing or food processing facility. The facility will expand support of bioscience fields and promote new programs to meet industry needs in emerging areas such as those required by the Merck expansion. In addition, the new building will be home to BRCC's existing nursing program.

Financial and Business Services

The Finance and Business Services sector represents industries that provide finance, insurance, real estate, accounting, and consulting services. Regional job growth in the sector has historically outpaced that of the state and nation. In Region 8, 2,126 establishments currently employ 18,913 workers, with an average annual salary of \$52,730. With a LQ of 1.43 and 3,737 employees, Depository Credit Intermediation (NAICS 5221) is the Region's top subsector. It has added 335 jobs over the past two years. Printing and Related Support Activities (with an LQ of 4.05) is also a concentrated industry within Region 8; however, this subsector lost 73 jobs within the last two years and is projected to lose another 222 during the next five years.

Health Care

As mentioned previously, the Region 8 Council understands that healthcare-related projects are generally considered ineligible for GO Virginia funding. Nevertheless, Health Care remains a very influential sector on the Region's current economy and on its quality of life. More importantly, a reliable and vibrant health care sector is essential to attracting talent to the region to support the other targeted sectors that are in keeping with GO Virginia's objectives.

The Health Care sector represents industries that provide health care and social assistance for individuals. Industries in this sector cooperate in the process to serve patients through health care providers, technology, and research. Establishments include hospitals, doctors' offices, nursing homes, surgery centers, laboratories, and medical research centers. As of 2019 Q1, 32,947 workers were employed at 2,903 establishments in Region 8. This is an increase of 609 workers over the last two years. Looking forward, Region 8 is projected to add 2,535 Health Care jobs by 2024, a 7.7% increase. General Medical and Surgical Hospitals (NAICS 6221) remains the region's core subsector, employing over 8,600 workers.

The Region 8 Council remains keenly aware of and concerned about the growing demand for a skilled nursing workforce to support the evolving Health Care sector of our regional economy. Additionally, over 3,000 nurses are expected to retire in the next few years, creating significant need to "fill the pipeline" with well-trained replacements. As such, Health Care will continue as one of Region 8's targeted sectors that will be addressed through non-GO Virginia avenues.

A noteworthy, non-GO Virginia project to address the nursing shortage in Region 8 was announced in June 2018. James Madison University (JMU) was awarded \$2.7 million in federal funding to recruit, admit, and retain students interested in pursuing nursing and working in underserved primary care environments in Page County. Funding was awarded through the Department of Health and Human Services' Nurse Education, Practice, Quality and Retention Program. Funding will be used to create partnerships with Valley Health Page Memorial Rural Health Centers, and Counseling and Psychological Services to address shortages in primary, mental health, and substance/opioid abuse treatment in Page County within rural health clinics. During the four-year funding period, 56 scholars will receive training.

Furthermore, Blue Ridge Community College (BRCC) is completing construction of a 20,000 square foot bioscience building. The facility will be home to the school's nursing program and a microbiology laboratory. New programs to train paramedics, histologists, and medical laboratory technicians are set to be launched when the building opens for the 2019 fall semester. BRCC's programs will support the growing need for biology, nursing, and allied health professions in the workforce.

Information Technology/Communications

The Information Technology/Communications sector represents industries involved in the development, manufacturing, and usage of IT and communications-related products and services. This industry currently employs 5,070 workers at 550 establishments. During the last two years, this industry added 303 jobs, a 6.4% increase. While the Security Systems Services subsector has shown growth in the region, the subsectors with the most employees are Telecommunications Resellers (NAICS 517911), Software Publishers (NAICS 511210), and Computer Systems Design Services (NAICS 541512). Telecommunications Resellers has a LQ of 6.55 and gained 248 jobs during the last two years. Average annual wages in IT/Communications is \$67,771.

Light Manufacturing

Light Manufacturing encompasses the range of processes in which materials are mechanically, physically, or chemically transformed into new products. Manufacturing has a strong legacy throughout Region 8 and continues to be a significant industry. It has six subsectors with location quotients above 4.00. The most concentrated is Sugar and Confectionery Product Manufacturing (NAICS 3113) with a LQ of 8.77. For the first quarter of 2019, Light Manufacturing employed 20,266 workers at 440 establishments. Jobs that are in demand in this sector are higher skill and, therefore, higher wage positions, with average annual earnings of \$47,597. The top two subsectors for employment are Plastics Product Manufacturing (NAICS 3261) and Printing and Related Support Activities.

This industry continues to experience changes from technological advancements and increased productivity levels. During the last two years, Region 8 experienced an increase of 244 light manufacturing jobs; however, the overall trend is a reduction in the number of employees both regionally and nationally, and Region 8 is projected to lose 688 jobs over the next five years. Despite this downward trend, Region 8 is positioned to outperform similar markets given its valuable assets on which it can capitalize to ensure that local operators have the resources to be successful.

Rockbridge Area Advanced Manufacturing Project (RAAMP) – Byers Technical Institute (BTI), a new technical training center in Rockbridge County, partnered with the City of Buena Vista and the Rockbridge County Economic Development Authority to produce a pipeline of skilled welders for manufacturing companies throughout Region 8. BTI offers a 40-week advanced welding program to prepare students to enter the welding field at the Journeyman level. A GO Virginia grant is supporting the expansion of this program by providing funding for instructors and training equipment.

Transportation and Logistics

The Transportation and Logistics sector represents industries that link producers and consumers through interconnected supply chains and an array of transportation modes. Logistics industries

provide detailed coordination to increase efficiency in multi-modal transportation systems. Services within this sector primarily include transportation of passengers and goods, storing and warehousing products, and providing service and facilitating distribution to these establishments.

This sector employs 13,892 workers at 642 establishments. Average annual wages are \$48,242. Of the Region's seven targeted sectors, Transportation and Logistics added the most jobs over the last two years – 659. More than half of those jobs were in Warehousing and Storage (NAICS 4931), the top subsector in this industry having an LQ of 3.17. Nonscheduled Air Transportation (NAICS 4812), with an LQ of 5.77, showed growth during the last couple of years. It gained 144 jobs, a 47% increase from 2017. Over the next five years, this industry is expected to have an average annual growth rate of 1.2% compared to 0.6% for all industries.

Value-Added Food Manufacturing

As with the Biomedical/Biotechnical sector, Value-Added Food Manufacturing was added as a target to Region 8's Economic Growth and Diversification Plan with the 2018 amendment. Value-Added Food Manufacturing is an industry that marries Region 8's agricultural roots with its manufacturing legacy. In this sector, manufacturers process and convert a raw commodity into a consumable good. This may require adding ingredients, packaging, or changing the genetics of the product. Value-added goods are sold at a higher price, allowing manufacturers to capture a larger share of the food dollar. A location quotient of 2.55 reinforces the strength of Value-Added Food Manufacturing in the area, and demonstrates that Region 8 is highly specialized in a diverse range of value-added processes. In fact, the LQ for this sector is higher than that for Light Manufacturing at 1.51.

Value-Added Food Manufacturing currently employs 20,266 workers at 290 establishments; however, unlike the Light Manufacturing industry, Value-Added Food Manufacturing is projected to grow by 739 jobs over the next five years, a 0.7% average annual growth rate. Average annual wages in this industry cluster are \$41,420, and core subsectors are Warehousing and Storage (NAICS 4931) and Animal Slaughtering and Processing (NAICS 3116).

Workforce & Talent Gaps

It is a well-known and widely discussed fact that retirement of many “baby boomers” will create a significant void in the workforce across multiple industries in the next five to ten years. With the projected loss of skilled workers, along with the anticipated growth in key sectors of the economy, it is imperative that creative solutions to the “brain drain” be developed and put into place as soon as possible. This will be an even greater challenge for rural areas, as population growth remains stagnant, declines, or as workforce participation rates decrease in relation to other demographics (e.g. median age).

While Region 8’s average annual growth in population has been on par with that of Virginia and the United States (just under 1% in 2018), the demand for new or replacement workers across all sectors of the Region’s economy over the next five years is seven times greater. More specifically, as shown in the table below, total demand in Region 8’s target industries (alone) forecasts a need for over 64,000 new or replacement workers. Therefore, in order for the Shenandoah Valley to remain a competitive and attractive location for business growth, the Region must remain diligent in tackling the workforce and talent gap challenges.

	Current		5-Year Forecast			
	Four Quarters Ending with 2019q1			Separations		Growth
Target Industry Sector	Empl	Avg Ann Wages ¹	Total New Demand	Exits	Transfers	Empl
Biomedical/Biotechnical	2,638	\$59,919	1,261	450	802	10
Financial and Business Services	18,913	\$55,314	9,452	3,533	5,467	542
Health Care	32,947	\$57,725	19,196	8,146	8,644	2,406
IT/ Communications	5,006	\$60,459	2,325	741	1,458	126
Light Manufacturing	20,266	\$52,065	9,704	3,907	6,512	-715
Transportation and Logistics	13,892	\$54,561	8,946	3,140	4,946	861
Value-Added Food Manufacturing	22,128	\$51,092	13,439	5,279	7,457	703
TOTAL - Target Sector Occupations*	115,790		64,323			
	2019		2024			
Estimated Population:	542,976		563,453			
Projected Growth (2019 to 2024):		20,477				

**Note: Occupations may overlap multiple industries, thus current and forecast numbers may not be completely accurate.
Source: JobsEQ*

During the first two years of GO Virginia implementation, the Region 8 Council has readily acknowledged these labor force concerns; thus, most of the approved projects have primarily focused on advancing efforts to address the area's workforce gaps and enhancing the pipeline of future workers across the region. Projects include the Rockbridge Area Advanced Manufacturing Project (RAAMP) and the Cyber Security Workforce Development and Jobs Program, both discussed earlier in the Successes To-Date section. Two other projects, already approved for funding by the Region 8 Council and GO Virginia Board (discussed below), are intended to build the workforce pipeline across a mix of industry sectors, with a third project addressing both talent pipeline and entrepreneurial support needs.

Shenandoah Valley Talent Solutions Strategy Development: The economic development organizations in the Northern Shenandoah Valley Region, including the counties of Clarke, Frederick, Page, Shenandoah, and Warren and the City of Winchester, partnered to procure a Talent Solutions Strategy focused on job seekers, university and community college graduates, and high school students. The study will deliver a solution to the talent shortage, with a focus on three areas: (1) the retention of high school and college graduates to live and work in the Valley, (2) development of the current labor force and job seekers to fulfill the needs of businesses in meaningful employment, and (3) the attraction of workforce from outside the region. The Northern Shenandoah Valley Region will expand on existing partnerships to build a region-wide Talent Solutions Team to implement the strategic recommendations from this study. The Talent Solutions team will be a collaboration of industry, education, and non-profit partners with the support of local governments.

Emil & Grace Shihadeh Innovation Center for Career and Technical Education-Winchester City Schools: The Center will be a hub for workforce development and a recruiting ground for regional businesses. The project will renovate the former John Kerr Elementary School into an advanced 50,000 square foot facility for career and technical education programs. The Center will focus its curriculum on three academies: (1) Professional Skills, (2) Health Sciences, and (3) Information Technology. GO Virginia funds will be used to outfit the facility with equipment necessary for welding, robotics, print, CAD and Cyber laboratories. The three academies will be supported by an expanded Work-Based Learning program that will connect students to regional businesses, filling high-wage jobs in the targeted clusters. The project secured 70 internship commitments from 15 companies. Seventy-five percent of those internships are with manufacturers enforcing skills in CAD, CNC, and welding. Twenty-five percent of the internships are in IT and cyber security occupations. Matching funds will support two Work-Based Learning Coordinators.

Staunton Tech-Lab Feasibility Study: In addition to supporting workforce development, the Tech-Lab Feasibility Study is exploring a makerspace concept to expand the region's entrepreneurial ecosystem. As a result, the Staunton Innovation Hub (SIH) is working with area partners to create a student-entrepreneur makerspace. This shared workspace is intended to teach creative and collaborative ways to use innovative equipment such as laser cutters, 3D printers, robotics and electronics. The City of Staunton and Page County are the participating localities. The SIH

received a GO Virginia grant to determine the need, potential impact, and implementation details of this concept including needed tools and equipment, support staff, curriculum and programming. The study will evaluate the feasibility of a bricks and mortar facility, as well as a mobile lab space that could travel to more rural communities.

As part of the Regional Summits held in March 2019 and the subsequent “call for projects,” two additional Talent Development initiatives are evolving and expected to request GO Virginia funding over the next two years. While specific elements of these initiatives are still being developed, each approach will help to address the workforce gaps being forecast for the Region, Virginia, and other areas of the nation. A description of these two projects is provided below:

Valley Talent Collaborative (VTC): Led by the Shenandoah Valley Workforce Development Board (SVWDB), the VTC intends to build a talent pipeline to address the skills gap that exists for job openings in the region. The VTC is based on creating a talent pipeline through work-based learning (WBL) and the creation of employer collaboratives using skills-based hiring for improved recruitment and retention. Target industries will be light manufacturing, transportation and logistics, IT and communication, finance and business services, and healthcare. The target population will include job seekers, workers, and businesses not eligible for Workforce Innovation & Opportunity Act (WIOA) services (e.g. in-school youth); the emerging workforce without barriers to employment, the transitioning workforce without barriers to employment, and the current worker not sponsored by their employer. The effort proposes to utilize sub-regional task forces of business and industry, education, local government, economic development, workforce system partners, and community-based organizations to connect sub-regional needs to flexible, customizable regional solutions for employers to build a talent pipeline. The partnership between the SVWDB and the sub-regional task forces will provide the support to move forward with VTC services to conduct asset mapping to identify workforce resources and avoid duplication of services, develop a local training fund to support work based learning opportunities, provide “Ready to Work” training opportunities for students, and develop and implement industry specific talent development strategies such as internships, work experiences, on-the-job training, incumbent worker training, workforce credentials, boot camps, and registered apprenticeship for youth and adults. The VTC would not be limited to WIOA eligibility and suitability requirements for the development of regional and sub-regional workforce solutions.

The Workforce Model: The purpose of this initiative is to develop a pipeline of skilled workers through a public-private partnership, based on a model utilized by one of the Region’s primary service providers – Valley Health. This project will rely on a consortium of Career and Technical Education experts, economic development practitioners, and a combination of human resources and operations managers from the private sector. The consortium will identify the skills gaps occurring in the region, and align those gaps with potential pathways to employment through the public school system and continuing education programs. The pathways will be developed based on available courses within the manufacturing career cluster established by the Virginia Department of Education, although the consortium will build out multiple entry points to the career pathway based on skill level. The Workforce Model will also incorporate the work-based learning matrix within each of the area’s public school divisions, including but not limited to:

internships, apprenticeships, mentorships, and job shadowing. While manufacturing will be the consortium's initial focus, the Model is intended to be replicated to serve all of the Region's target industries through their respective pipelines.

Several non-GO Virginia projects focused on workforce development and talent attraction are already underway in many of the localities in Region 8, as outlined below.

Frederick-Winchester-Clarke - The Widget Cup® Competition

The Widget Cup competition allows local high school students to showcase their skills, ingenuity, problem solving and teamwork to businesses, parents, educators and fellow students. Teams are given parameters for a "widget" they must design, build and present to a customer within a six-hour window.

Priority focus is on the trades but also includes engineering, marketing, computer graphics, CAD, and education.

The Frederick County EDA created the competition with Winchester City and Clarke County included. The Frederick County EDA Board, public schools of Frederick, Clarke and Winchester, local businesses, Winchester City Council, and the Winchester EDA Board are also all involved.

Front Royal Computer Programmers Project

Front Royal has engaged with a local business that has a very large contract with the federal government regarding a program it has developed. The business is looking for young computer programmers (right out of college) that are interested in making good money and not having to commute. Front Royal is working with local businesses and several universities.

Massanutten Educational Security Operations Center (E-SOC) Training

In partnership with Harrisonburg and Rockingham County, Massanutten Technical Center is constructing an E-SOC to train high school and adult education students in an actual SOC environment. This will be the first SOC training in the nation to train students at the high school level. The program will launch in fall 2019. The goal is for the students in the program to be trained for entry level SOC jobs or to further their cyber security education at the college level.

The focus on high school students is critical in growing the local technology workforce. The retention rate is much higher for local high school students to stay in the area compared to local college students.

Northern Valley Employer Expo

The Employer Expo is a combined effort to create a bigger impact event. Organizations that partner together include The Workforce Initiative, EDA's of Frederick, Clarke and Winchester, local businesses, and Virginia Career Works (Adult Ed, Literacy Volunteers, DARS, VEC, Department of Blind and Vision Impaired, etc.)

Exhibitors at the event are businesses that are hiring within six to twelve months and are open to speaking with students about job shadowing, internship, apprenticeship, and the career journey. Workshops are offered for resume writing, professional attributes, and mock interviews.

Attendees completing all three workshops are eligible for a scholarship drawing. Scholarships are sponsored by businesses and the event is free and open to the public. Marketing targets include parents, students, educators and Virginia Career Works population.

Shenandoah County Industry Roundtable & Workforce Survey

Shenandoah County Economic Development facilitated a roundtable discussion which included local manufacturers as well as Shenandoah County Public Schools, Lord Fairfax Community College (LFCC), and the Shenandoah Valley Workforce Development Board (SVWDB) to discuss skills gaps and curriculum opportunities to serve our manufacturers. The conversation originated around automation but has been extended. Work is now being done to survey all local businesses to better identify skills gaps and build an educational pipeline from K-12 through community college and beyond to address the needs of our local businesses. In addition to the organizations listed above, the Shenandoah County Chamber of Commerce and the Town of Strasburg are also partnering in this effort.

Manufacturing, automation, as well as machinery & equipment operation are all job areas that have been targeted. Others may be identified through the survey, which is out now.

Staunton-Augusta-Waynesboro Career and Technical Education Plan

In 2018, Staunton, Augusta County, and Waynesboro, with the support of the Valley Career and Technical Center, Public School Systems in Augusta County, Staunton, and Waynesboro, Wilson Workforce Rehab Center, Blue Ridge Community College, Shenandoah Valley Partnership, Augusta Regional Chamber, and Shenandoah Valley Workforce Development Board completed a 10-Year Strategic Plan to help guide career and technical education in the sub-region. Manufacturing, value-added agriculture, life sciences, and other related jobs are targeted. New projects and initiatives are already arising in the region based on the goals and recommendations of this strategic plan.

Project Pipeline

In early 2019, the Region 8 Council revisited the process by which projects coming before them were being developed and considered for funding, particularly in relation to the overall goals of the GO Virginia program. Subsequently, a new pipeline development process was outlined and implemented that enables Council to take a more strategic, holistic, and proactive approach to reviewing and planning for grant requests. In addition, the process allows Council members to define and prioritize their support for projects across all four of the GO Virginia frameworks, while also providing guidance to regional partners in advance of preparing and submitting grant applications.

To ensure broad input, community support, and an opportunity for a wide range of collaboration across the Region, an extensive group of stakeholders were invited to participate in the process. In total, nearly 80 local and regional partners attended the two initial Region 8 “Summit” meetings in March 2019.

Region 8 Pipeline Development Process: FY20

Purpose: To provide for a more deliberate and proactive approach to identifying and funding projects across the region. Benefits include:

- Planning and budgeting for local match
- Identification of partnering opportunities within and outside of Region 8
- Better alignment with regional planning activities (e.g. CEDS, SET) and Region 8 Growth & Diversification Plan
- Allows Council to define priorities and pre-allocate available funding for each fiscal year
- Provides for a continuous pipeline of projects

Approach:

- 1) Compilation of potential projects outlined in strategy documents and already in development
- 2) Region 8 “Summit” organized for mid-March (for 2019)*
 - a. Two locations (northern and southern Valley areas)
 - b. Review GO Virginia program goals and requirements
 - c. Confirm project ideas and initiatives already identified in the region
 - d. “Call for projects” (Project Abstracts) solicitation* (*See sample Project Abstract Form in Appendix 3*)
 - e. Briefing on other (non-GO Virginia) funding resources and grant programs

** Region 8 Summits to be held every other year in late Summer; Call for Projects solicitation to occur annually each Fall to better align with local budget development timelines.*

- 3) Project ideas classified by GO Virginia Frameworks (Workforce, Site Development, Entrepreneurial Ecosystem, Scale-up) and development status
- 4) Region 8 Council establishes project priorities for FY20 at April meeting based on:
 - a. Level of preliminary work
 - b. Availability of matching funds
 - c. Timeline for execution/implementation
 - d. Opportunities for collaboration inside/outside Region 8
 - e. Regional and State benefits (ROI)
- 5) Priority projects reviewed with DHCD; comments shared with Project Abstract author(s)
- 6) Project development/advancement with start of new fiscal year in July 2019
- 7) No grant applications will be accepted/considered in the interim (Note: applies only to January-June 2019)

Who to include/invite to Summit meetings:

- Local & regional ED partners
- Public education partners
- Higher education partners
- Entrepreneurial & business support organizations
- Key business leaders
- Other regional stakeholders (e.g. elected officials)
- DHCD, USDA, SVWDB

Priority Projects – FY20-FY21:

Based on the outcomes of the Region 8 Summits and subsequent “call for projects” in the spring of 2019, Council reviewed and evaluated the 11 project concepts (“abstracts”) that were presented to them at their meeting on April 23, 2019. After a multi-voting exercise to determine Council members’ level of interest in and support for forthcoming proposals, the votes were tallied to provide a list of priorities for each of the four GO Virginia frameworks. As such, the Region 8 Council is anticipating, and willing to direct funding towards, projects around the proposed concepts over the next 12-18 months (see chart below). Naturally, all GO Virginia guidelines will need to be met and the proposals supported by DHCD staff; thus, Region 8’s Program Director and the two support organizations (i.e. CSPDC and NSVRC) will work directly with the applicants to ensure project proposals are aligned with the goals and criteria of the Program. Additionally, any grant requests outside of the project concepts approved in April 2019 will require a shuffling of current priorities by Council, should they wish to consider an alternative project for the FY20-21 period.

GO VA Framework: Business Scale-up:						
Council		Comp. Grant	Estimated Amount	Participating	Funds Identified	Est Timeline
Priority	Project Name	(Yes or No?)	Grant Request	Localities	(Yes or No?)	to Execute
#2-b	SV Industrial Hemp Initiative	Not initially, but possible	\$60,000 (Phase 1); \$400,000 (Phase 2)	TBD	N	Q3/Q4
#7	The Business of Early Childhood Education Initiative**	No	\$100,000	TBD	N	Q2
#5	SVP Economic Gardening Program	No	\$100,000	TBD	N	Q3/Q4
GO VA Framework: Site Development:						
#4	SVP Tier 2 to Tier 3 Sites Advancement	No	\$250,000	TBD	N	Q2
#3-a	SV Regional Business Park Study	No	\$20,000	TBD	N	Q1
#1	SV Aviation Park*	No	\$600,000-\$1,000,000	Staunton, Waynesboro, Harrisonburg, Augusta, Rockingham	\$2 million - USDA Rural Development loan	Q3/Q4
GO VA Framework: Start-up/Entrepreneurial Ecosystem:						
#2-a	Valley Emerging Technology Incubator (VETI)*	No	\$500,000	TBD	N	Q2
#6	Feasibility Study: Agricultural Enterprise Center of VA*	Not initially, but possible	\$90,000	TBD	Y - USDA Grant	Q1
#8	SILI HubLabs - Phase 2*	No	\$300,000	Staunton, Page	Y - \$60,000 offered by Staunton & Page	Q2
GO VA Framework: Talent Pipeline/Workforce:						
#2-c	The Workforce Model	Not initially, but possible	\$150,000	Frederick, Clarke, Warren, Shenandoah, Page, Winchester	\$50,000 - local EDO's and Schools; \$50,000 - private sector; \$50,000 - Claude Moore Foundation grant	Q3
#3-b	Valley Talent Collaborative	Yes	\$2,000,000	TBD	Y - WIOA (Federal) Funds	Q1
* indicates project elements could meet multiple GO Virginia frameworks						
** initial discussion with DHCD suggests GO Virginia criteria may be difficult to meet						
	Potential Requests - Min.:		\$3,790,000			
	Potential Requests - Max.:		\$4,530,000			
	FY19 Unallocated Per Capita Funds:		\$1,118,176			
	FY20 Per Capita Funds Allocation:		\$1,067,557			
	Total Per Capita Funds Available in FY20:		\$2,185,733			

Strengthening the Entrepreneurial Ecosystem

Introduction

As noted in the TEconomy study commissioned by GO Virginia, the Commonwealth of Virginia lags behind its peers in start-up formations. This is a key issue that must be addressed by all nine regions because of the implications for long-term job creation and economic growth. Region 8 has an unusually large number of institutions of higher learning, including eight universities, one college and three community colleges. Importantly, all of these educational institutions focus on teaching, not research. Thus, there has been limited intellectual property originating from these educational institutions. That said, these institutions graduate thousands of talented young adults annually, many of whom desire to start up their own business and continue to enjoy the lifestyle offered in the Shenandoah Valley. The GOVA Region 8 Council is committed to strengthening our entrepreneurial ecosystem to help provide an environment that encourages innovation and prudent risk taking in the pursuit of economic growth and diversification.

Organization

To accomplish the goal of strengthening our entrepreneurial ecosystem, an advisory group of business executives, university administrators, economic development professionals, and entrepreneurs from around Region 8 have volunteered to help identify existing assets and resources that support the region's entrepreneurial ventures. This is a "deep dive" utilizing TEconomy's key requirements, including Co-working Space/Incubators, Makers Space, Accelerators, Services/Programming and Funding Sources.

This working database of assets and resources will serve two purposes: 1) help entrepreneurs learn what services and support systems are available to them and, 2) identify critical gaps that must be addressed. More importantly, this advisory group will also be responsible for providing the Region 8 Council with alternative strategies to address high priority needs in support of the area's entrepreneurs. These strategies and any forthcoming proposals may, or may not, include GOVA funding requests.

Additionally, the Region 8 Council and James Madison University recently entered into an agreement that will provide a part-time, dedicated professional to oversee and coordinate entrepreneurial activities across the Shenandoah Valley. Two primary responsibilities of the Coordinator will be to: 1) Identify specific gaps in Region 8's Entrepreneurial Ecosystem, based on the database of assets and resources, and prioritize their importance and; 2) Identify alternative strategies to address high priority gaps (which may or may not include GOVA funding) for Region 8 Council's consideration. With JMU solely underwriting the cost of the Coordinator, it will be a natural fit for one of their experienced and respected employees to fill the Coordinator role. Thus, Mary Lou Bourne will serve in this capacity. As a well-known professional, long focused on the University's entrepreneurial efforts, Mary Lou has also been actively involved in the work of the Virginia Research Investment Committee (VRIC) and Virginia's University-based Economic Developers' group (UBED); however, she will report directly to the Region 8 Council's Executive Committee and commit 40% of her time to this role throughout the Region.

Region 8's Entrepreneurial Ecosystem Assets and Resources

The working database of Region 8's Entrepreneurial Ecosystem Assets and Resources and related contact information is provided in the following table. This data base will be continually updated to reflect any new information that will be helpful for the users, and will also be available through the Shenandoah Valley Innovation Coalition website at: svic.biz/resource-directory.

Region 8 Entrepreneurial Ecosystem Inventory

Resource	Point of Contact
Co-Working Space/ Incubators:	
Staunton Innovation Hub	Miriam Burrows
The Hub in Harrisonburg	Kirsten Moore
Lexington Collaboratory	lexmakerspace@gmail.com
Monterey Highland Center	thehighlandcenter.org
Broadway	Eugene Bare
The Hub in Winchester	TheHubWinchester@gmail.com
Waynesboro Farmhaus on Main	Greg Hitchin
Makers Space:	
JMU X Labs	Nick Swayne
Staunton Makers Space	Miriam Burrows
Staunton Innovation Hub Mobile Lab	Miriam Burrows
Winchester Shihadeh Innovation Center	Ashley Shickle
Lexington Collaboratory	lexmakerspace@gmail.com
Accelerators:	
JMU Summer Program	Patrick McQuown
757 Accelerate	Evans McMillion- 757accelerate.org
Lighthouse Labs	lighthouselabsrva.com

Start-Up Virginia	startupvirginia.org
RAMP	Mary Miller
Mach 37 Cyber Start ups	cit.org
ReaKtor Business Tech Innovation Center	ReaKtoraccelerator.org
Support Services/Programming:	
Rockbridge Area REDI Project	Sam Crickenberger
Co-Starters-Harrisonburg	Peirce Macgill
SBDC ICAP Program	Bob Smith
Zoning/Environmental Issues	Jared Burden
Business Law	Flora Pettit
Accounting/Tax	PBMares
Insurance	LD&B
Intellectual Property	Dan Fitch
Patents/Trademarks	Ben Rothermal - bcrfirm.com
BizLab-JMU Ice House	Maya Epelbaum
Shenandoah University SAFE Program	su.edu SAFE Program
Social Media	Chiedo Labs
VEDP Export Virginia	ExportVirginia.org
Exporting VASBDC International Trade	Aaron Miller 703-277-7715
Staunton Creative Community Fund	Debbie Irwin
JMU: Small Business Development Ctr.	Joyce Krech
LFCC: Small Business Development Ctr.	Christine Kriz
Shenandoah Valley Technical Council	Nicky Swayne
Licensing	Flora Pettit
SCORE Business Counseling	Highland Center & Waynesboro ED office

Fiber to the Home	Shentel- Chris Kyle
svic.biz/resource-directory/	Debbie Irwin/Mary Lou Bourne
www.GrowWaynesboro.com	Greg Hitchin
Valleybusinessstartup.com	Greg Hitchin
Staunton VIDA Program	Billy Vaughn
Funding Sources:	
Shenandoah Valley Angel Investors (SVAI)	svangelinvestors.com
The Launch Place	Eva Doss
New Richmond Ventures	Ted Chandler
Charlottesville Angel Network	cvilleangelnetwork.net
Trolley Ventures	Tom York
CIT Gap Fund	cit.org
CIT Founders Fund	cit.org
VTC Innovation Fund	James Ramey
Middleland Capital	middlelandcap.com
S2G Ventures	s2gventures.com
Arborview Capital	Arborviewcapital.com
VA Small Business Financing Authority	sbsd.virginia.gov
Village Capital	vilcap.com
USDA Rural Development	www.rd.usda.gov
Collaboratory Micro Loans	lexmakerspace@gmail.com
Virginia is for Entrepreneurs	VA4E.org
Staunton Creative Community Fund	Debbie Irwin
Harrisonburg Revolving Loan Program	Brian Shull
Waynesboro Revolving Loan Program	Greg Hitchin

2019-2021 Strategies & Initiatives:

Several important improvements and enhancements to the regional ecosystem are anticipated over the next few years including:

1. Expansion of The Hub in Harrisonburg
2. Expansion of the Staunton Innovation Hub (SIH)
3. Creating a larger co-working space in downtown Waynesboro via a local redevelopment project
4. Creation of the Valley Emerging Technology Incubator at Shenandoah University (Possible GOVA project)
5. Installation of high- speed fiber-to-the- home internet services by Shentel in Harrisonburg, Staunton and Winchester
6. Installation of high-speed fiber in Stanley via partnership between SEGRA and Pioneer Bank
7. Installation of high- speed fiber internet in White Post via a \$209,513 grant from the Virginia Telecommunications Initiative and a commitment of \$119,463 by Comcast
8. Opening of the GreySurf Cyber Center (off shoot of the BRCC Cyber Security curriculum funded, in part, by GOVA)
9. Opening of a Cyber Security Operations Center at Massanutten Technical Center to train multi-cultural high school students
10. Mary Baldwin University's plans for opening an X Lab at Staunton Innovation Hub
11. Implementation of SIH's Mobile Makers Lab (Possible GOVA project)
12. Utilization of the Shihadeh Innovation Center for Makers Space during off hours (Possible GOVA project)
13. Business expansion from six technology-based start-ups funded by Shenandoah Valley Angel Investors (approximately \$2.3m)
14. Pursuit of crowdfunding sources and community foundation funds
15. Designating Centers of Excellence at selected universities

Gap Analysis

On a priority basis, the region clearly needs to establish accelerators which will, in turn, trigger the need for more resources for support services and programming. Finally, there is a need for more seed funding sources in the early stages of start-ups, e.g. proof of concept/customer discovery and beta testing.

Next Steps

1. Finalize initial Assets and Resources working database and utilize the Shenandoah Valley Innovation Coalition's software platform (svic.biz/resource-directory/) to communicate to the entrepreneurial to community via linking with multiple websites including: GOVA Region 8, Shenandoah Valley Partnership, Shenandoah Valley Tech Council and local Chambers of Commerce
2. Identify alternative strategies to address high priority gaps (which may, or may not, include GOVA funding) for Region 8 Council's consideration

Appendix 1 – Detailed Baseline Data Reports

Industry Snapshot of GO Virginia Region 8 4-Digit Targets in GO Virginia Region 8, 2019q1											
NAICS	Industry	Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl	Total New Demand	Separations (Approximate)		Growth	
		Empl	Avg Ann Wages	LQ	Empl	Region		Exits	Transfers	Empl	Avg Ann Rate
6221	General Medical and Surgical Hospitals	8,611	\$58,234	0.95	-379	-2.1%	3,460	1,615	1,706	139	0.3%
4931	Warehousing and Storage	5,620	\$42,909	3.17	379	3.5%	4,144	1,347	2,165	632	2.2%
3116	Animal Slaughtering and Processing	5,289	\$36,901	6.62	-16	-0.2%	3,161	1,197	1,960	5	0.0%
6211	Offices of Physicians	4,328	\$86,057	1.03	620	8.0%	2,166	831	958	377	1.7%
6241	Individual and Family Services	3,948	\$24,922	0.94	-478	-5.5%	3,263	1,294	1,259	710	3.4%
3261	Plastics Product Manufacturing	3,846	\$55,242	4.23	80	1.1%	1,947	733	1,309	-94	-0.5%
5221	Depository Credit Intermediation	3,737	\$48,903	1.43	335	4.8%	1,863	709	1,125	29	0.2%
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	3,509	\$27,273	2.39	255	3.8%	2,810	1,140	1,112	558	3.0%
4841	General Freight Trucking	3,259	\$55,223	1.78	-122	-1.8%	1,786	680	1,046	60	0.4%
3231	Printing and Related Support Activities	2,780	\$39,565	4.05	-73	-1.3%	1,244	594	872	-222	-1.6%
6231	Nursing Care Facilities (Skilled Nursing Facilities)	2,084	\$31,365	0.82	15	0.4%	1,044	541	528	-25	-0.2%
1120	Animal Production (Proprietors)	2,070	\$36,529	2.88	-320	-6.9%	810	604	161	45	0.4%
5413	Architectural, Engineering, and Related Services	1,790	\$70,351	0.73	145	4.3%	849	274	486	89	1.0%
6213	Offices of Other Health Practitioners	1,669	\$42,649	0.99	142	4.6%	946	343	388	215	2.5%

5419	Other Professional, Scientific, and Technical Services	1,561	\$39,842	0.93	54	1.8%	818	306	423	90	1.1%
6216	Home Health Care Services	1,409	\$30,073	0.57	202	8.0%	1,085	417	372	296	3.9%
4461	Health and Personal Care Stores	1,381	\$32,855	0.81	-14	-0.5%	824	358	429	38	0.5%
3115	Dairy Product Manufacturing	1,339	\$58,074	5.94	66	2.6%	840	302	484	54	0.8%
6212	Offices of Dentists	1,334	\$54,547	0.90	92	3.6%	708	305	296	106	1.5%
3219	Other Wood Product Manufacturing	1,256	\$32,304	3.31	-83	-3.1%	630	256	418	-43	-0.7%
3119	Other Food Manufacturing	1,106	\$47,600	3.07	-75	-3.2%	680	254	397	29	0.5%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	1,106	\$46,270	0.64	-83	-3.5%	564	221	315	29	0.5%
5416	Management, Scientific, and Technical Consulting Services	1,093	\$61,309	0.41	58	2.8%	613	187	325	100	1.8%
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	1,080	\$55,151	1.00	-31	-1.4%	575	207	348	20	0.4%
3113	Sugar and Confectionery Product Manufacturing	1,047	\$37,198	8.77	65	3.3%	570	245	371	-45	-0.9%
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	1,033	\$47,905	5.10	33	1.7%	430	184	332	-86	-1.7%
3254	Pharmaceutical and Medicine Manufacturing	1,029	\$96,013	2.27	126	6.7%	509	172	323	14	0.3%
5411	Legal Services	989	\$55,407	0.53	28	1.4%	379	171	217	-8	-0.2%
6222	Psychiatric and Substance Abuse Hospitals	989	\$41,720	2.58	-156	-7.1%	193	185	213	-205	-4.5%
5415	Computer Systems Design and Related Services	983	\$78,323	0.29	-68	-3.3%	483	119	270	93	1.8%
4921	Couriers and Express Delivery Services	974	\$39,304	0.93	-23	-1.2%	603	218	356	28	0.6%
5242	Agencies, Brokerages, and Other Insurance Related Activities	963	\$51,997	0.48	53	2.9%	516	195	279	41	0.8%

3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	937	\$44,258	3.55	87	5.0%	519	206	333	-20	-0.4%
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	927	\$30,228	0.81	-16	-0.9%	643	282	283	77	1.6%
4842	Specialized Freight Trucking	895	\$46,387	1.22	-23	-1.3%	500	191	293	17	0.4%
3323	Architectural and Structural Metals Manufacturing	888	\$45,411	1.47	28	1.6%	473	159	308	6	0.1%
3121	Beverage Manufacturing	881	\$33,079	2.13	93	5.7%	540	201	319	20	0.5%
5313	Activities Related to Real Estate	862	\$45,855	0.65	44	2.6%	509	202	228	78	1.8%
6214	Outpatient Care Centers	762	\$51,504	0.50	230	19.7%	445	151	188	107	2.7%
3273	Cement and Concrete Product Manufacturing	758	\$49,855	2.52	-130	-7.6%	415	149	250	15	0.4%
1110	Crop Production (Proprietors)	737	\$30,949	1.72	-9	-0.6%	330	197	101	31	0.8%
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	728	\$35,725	1.83	58	4.3%	370	157	226	-13	-0.3%
3222	Converted Paper Product Manufacturing	704	\$45,053	1.70	-55	-3.7%	343	137	234	-27	-0.8%
3363	Motor Vehicle Parts Manufacturing	687	\$40,580	0.75	44	3.3%	335	126	226	-17	-0.5%
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	660	\$37,032	1.23	9	0.7%	315	133	222	-40	-1.2%
3118	Bakeries and Tortilla Manufacturing	616	\$40,733	1.23	111	10.4%	399	172	230	-2	-0.1%
5311	Lessors of Real Estate	579	\$30,640	0.58	4	0.4%	292	137	167	-12	-0.4%
3391	Medical Equipment and Supplies Manufacturing	535	\$65,062	1.08	-31	-2.8%	274	102	170	2	0.1%
5179	Other Telecommunications	524	\$46,618	4.15	260	40.9%	185	82	158	-55	-2.2%
5112	Software Publishers	478	\$89,129	0.74	-34	-3.4%	232	59	134	39	1.6%
5191	Other Information Services	478	\$43,060	0.66	-96	-8.7%	326	83	151	92	3.6%

3141	Textile Furnishings Mills	452	\$26,197	5.72	37	4.4%	168	103	130	-65	-3.1%
4812	Nonscheduled Air Transportation	450	\$68,456	5.77	144	21.3%	181	75	128	-22	-1.0%
5222	Nondepository Credit Intermediation	439	\$65,659	0.46	57	7.2%	259	81	137	42	1.8%
3211	Sawmills and Wood Preservation	414	\$36,710	2.79	13	1.6%	222	84	149	-11	-0.6%
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	402	\$43,415	0.70	12	1.5%	212	72	133	6	0.3%
5173	Wired and Wireless Telecommunications Carriers	382	\$60,423	0.38	-24	-3.0%	154	60	120	-25	-1.4%
8122	Death Care Services	381	\$35,518	1.53	-28	-3.5%	228	109	121	-2	-0.1%
3322	Cutlery and Handtool Manufacturing	380	\$51,458	6.55	11	1.5%	167	69	122	-24	-1.3%
5241	Insurance Carriers	361	\$58,715	0.20	8	1.1%	155	61	100	-6	-0.4%
6219	Other Ambulatory Health Care Services	346	\$35,516	0.66	17	2.6%	179	55	86	38	2.1%
3399	Other Miscellaneous Manufacturing	339	\$33,955	0.65	-15	-2.2%	158	66	105	-13	-0.8%
5619	Other Support Services	312	\$28,640	0.56	89	18.4%	183	74	100	8	0.5%
5418	Advertising, Public Relations, and Related Services	301	\$43,193	0.37	50	9.4%	158	61	95	1	0.1%
5322	Consumer Goods Rental	285	\$34,016	1.22	-36	-5.8%	140	65	94	-19	-1.4%
4884	Support Activities for Road Transportation	272	\$33,952	1.30	-17	-2.9%	173	62	90	21	1.5%
5231	Securities and Commodity Contracts Intermediation and Brokerage	267	\$140,533	0.38	14	2.7%	113	39	79	-5	-0.4%
6239	Other Residential Care Facilities	267	\$28,926	0.96	69	16.3%	131	70	81	-20	-1.6%
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	266	\$67,782	0.42	68	15.8%	104	42	74	-12	-0.9%

3344	Semiconductor and Other Electronic Component Manufacturing	259	\$57,699	0.45	27	5.7%	102	43	74	-15	-1.2%
5417	Scientific Research and Development Services	257	\$94,997	0.23	31	6.7%	130	37	73	19	1.5%
3111	Animal Food Manufacturing	256	\$49,305	2.61	-3	-0.6%	142	53	88	1	0.1%
5622	Waste Treatment and Disposal	254	\$35,773	1.42	0	-0.1%	102	46	79	-23	-1.9%
4821	Rail Transportation	244	\$77,438	0.75	-3	-0.5%	102	36	74	-8	-0.7%
5239	Other Financial Investment Activities	197	\$73,013	0.24	12	3.2%	104	32	57	16	1.5%
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	187	\$73,529	0.18	-51	-11.4%	86	32	57	-3	-0.4%
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	169	\$64,903	0.31	1	0.3%	80	31	53	-4	-0.5%
3152	Cut and Sew Apparel Manufacturing	157	\$26,677	0.96	16	5.6%	47	38	40	-31	-4.3%
5414	Specialized Design Services	153	\$35,616	0.46	5	1.8%	75	29	42	4	0.5%
4881	Support Activities for Air Transportation	141	\$48,473	0.34	37	16.6%	87	29	45	13	1.8%
4245	Farm Product Raw Material Merchant Wholesalers	134	\$20,994	1.19	23	9.7%	62	28	48	-14	-2.2%
4885	Freight Transportation Arrangement	134	\$43,091	0.35	20	8.5%	72	26	41	5	0.8%
4855	Charter Bus Industry	133	\$28,383	2.84	30	13.5%	78	44	32	1	0.2%
5182	Data Processing, Hosting, and Related Services	133	\$61,332	0.24	4	1.4%	66	20	39	8	1.2%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	130	\$39,262	1.03	35	16.9%	77	27	45	5	0.7%
3221	Pulp, Paper, and Paperboard Mills	129	\$66,724	0.89	-89	-23.1%	46	22	40	-17	-2.7%
3332	Industrial Machinery Manufacturing	128	\$53,556	0.69	13	5.3%	47	21	38	-11	-1.8%

1151	Support Activities for Crop Production	124	\$24,268	0.22	-12	-4.4%	93	25	63	5	0.8%
5223	Activities Related to Credit Intermediation	124	\$71,487	0.26	43	24.1%	76	24	39	12	1.9%
3359	Other Electrical Equipment and Component Manufacturing	109	\$57,673	0.48	34	20.7%	52	20	35	-4	-0.7%
6215	Medical and Diagnostic Laboratories	109	\$55,910	0.25	31	18.0%	60	21	26	13	2.3%
4889	Other Support Activities for Transportation	102	\$34,724	1.73	44	32.5%	51	25	35	-9	-1.7%
3329	Other Fabricated Metal Product Manufacturing	100	\$53,113	0.23	0	0.1%	53	18	33	2	0.3%
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	100	\$67,519	0.38	-1	-0.4%	62	20	34	8	1.6%
4859	Other Transit and Ground Passenger Transportation	98	\$19,370	0.40	25	16.1%	67	33	24	10	2.0%
3379	Other Furniture Related Product Manufacturing	88	\$37,964	1.55	-9	-4.7%	44	19	28	-3	-0.7%
3372	Office Furniture (including Fixtures) Manufacturing	80	\$37,409	0.47	19	14.7%	40	16	25	-1	-0.3%
3259	Other Chemical Product and Preparation Manufacturing	78	\$63,697	0.59	-19	-10.4%	30	13	25	-8	-2.0%
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	75	\$39,954	0.18	75	n/a	46	15	17	14	3.5%
3272	Glass and Glass Product Manufacturing	65	\$31,955	0.48	29	34.9%	28	13	21	-6	-1.9%
3112	Grain and Oilseed Milling	52	\$84,034	0.57	-8	-7.0%	31	11	19	2	0.6%
3133	Textile and Fabric Finishing and Fabric Coating Mills	45	\$43,216	0.97	16	25.2%	18	9	14	-6	-2.7%
4862	Pipeline Transportation of Natural Gas	44	\$112,895	0.97	29	67.3%	20	7	14	-1	-0.4%

3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	37	\$54,094	0.67	10	17.4%	15	6	12	-3	-1.7%
3312	Steel Product Manufacturing from Purchased Steel	37	\$56,951	0.42	22	57.9%	19	7	13	0	-0.1%
3341	Computer and Peripheral Equipment Manufacturing	34	\$93,194	0.14	7	11.2%	13	4	9	-1	-0.6%
3149	Other Textile Product Mills	21	\$25,137	0.21	-106	-59.2%	9	5	6	-2	-1.8%
3331	Agriculture, Construction, and Mining Machinery Manufacturing	15	\$70,317	0.04	0	1.1%	8	3	5	0	0.6%
3271	Clay Product and Refractory Manufacturing	11	\$25,681	0.17	-9	-26.0%	6	2	4	0	0.1%
5259	Other Investment Pools and Funds	8	\$86,409	0.56	5	78.9%	4	1	2	0	0.7%
4811	Scheduled Air Transportation	7	\$47,337	0.01	-7	-29.3%	4	1	2	0	0.6%
5251	Insurance and Employee Benefit Funds	7	\$42,129	0.74	0	-1.4%	4	1	2	0	0.8%
4882	Support Activities for Rail Transportation	5	\$45,739	0.09	-1	-9.9%	3	1	2	0	0.7%
4883	Support Activities for Water Transportation	4	\$18,287	0.02	0	0.9%	2	1	1	0	0.7%
3353	Electrical Equipment Manufacturing	3	\$35,900	0.02	-21	-62.8%	2	1	1	0	-0.1%
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	3	\$70,100	0.10	-3	-26.6%	2	1	1	0	-0.2%
3369	Other Transportation Equipment Manufacturing	2	\$43,060	0.04	-2	-25.9%	1	0	1	0	0.5%
4831	Deep Sea, Coastal, and Great Lakes Water Transportation	2	\$20,343	0.04	0	0.9%	1	0	1	0	0.9%
3315	Foundries	1	\$29,931	0.01	0	0.9%	1	0	0	0	0.7%
3333	Commercial and Service Industry Machinery Manufacturing	1	\$31,323	0.01	0	0.9%	1	0	0	0	0.7%

3364	Aerospace Product and Parts Manufacturing	1	\$36,136	0.00	0	0.9%	0	0	0	0	0.7%
3366	Ship and Boat Building	1	\$36,136	0.00	0	0.9%	1	0	0	0	0.7%
4832	Inland Water Transportation	1	\$20,343	0.03	0	0.9%	1	0	0	0	0.9%
	GO Virginia Region 8 4-Digit Targets	97,955	\$48,080	1.03	2,173	1.1%	0	0	0	3,495	0.7%
	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
	Source: JobsEQ®										
	Data as of 2019Q1										
	Note: Figures may not sum due to rounding.										

Industry Snapshot of GO Virginia Light Manufacturing in GO Virginia Region 8, 2019q1											
		Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl		Separations (Approximate)		Growth	
NAICS	Industry	Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
3261	Plastics Product Manufacturing	3,846	\$55,242	4.23	80	1.1%	1,947	733	1,309	-94	-0.5%
3231	Printing and Related Support Activities	2,780	\$39,565	4.05	-73	-1.3%	1,244	594	872	-222	-1.6%
3219	Other Wood Product Manufacturing	1,256	\$32,304	3.31	-83	-3.1%	630	256	418	-43	-0.7%
3113	Sugar and Confectionery Product Manufacturing	1,047	\$37,198	8.77	65	3.3%	570	245	371	-45	-0.9%
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	1,033	\$47,905	5.10	33	1.7%	430	184	332	-86	-1.7%
3254	Pharmaceutical and Medicine Manufacturing	1,029	\$96,013	2.27	126	6.7%	509	172	323	14	0.3%
3323	Architectural and Structural Metals Manufacturing	888	\$45,411	1.47	28	1.6%	473	159	308	6	0.1%
3121	Beverage Manufacturing	881	\$33,079	2.13	93	5.7%	540	201	319	20	0.5%
3273	Cement and Concrete Product Manufacturing	758	\$49,855	2.52	-130	-7.6%	415	149	250	15	0.4%
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	728	\$35,725	1.83	58	4.3%	370	157	226	-13	-0.3%
3222	Converted Paper Product Manufacturing	704	\$45,053	1.70	-55	-3.7%	343	137	234	-27	-0.8%

3363	Motor Vehicle Parts Manufacturing	687	\$40,580	0.75	44	3.3%	335	126	226	-17	-0.5%
3391	Medical Equipment and Supplies Manufacturing	535	\$65,062	1.08	-31	-2.8%	274	102	170	2	0.1%
3141	Textile Furnishings Mills	452	\$26,197	5.72	37	4.4%	168	103	130	-65	-3.1%
3211	Sawmills and Wood Preservation	414	\$36,710	2.79	13	1.6%	222	84	149	-11	-0.6%
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	402	\$43,415	0.70	12	1.5%	212	72	133	6	0.3%
3322	Cutlery and Handtool Manufacturing	380	\$51,458	6.55	11	1.5%	167	69	122	-24	-1.3%
3399	Other Miscellaneous Manufacturing	339	\$33,955	0.65	-15	-2.2%	158	66	105	-13	-0.8%
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	266	\$67,782	0.42	68	15.8%	104	42	74	-12	-0.9%
3344	Semiconductor and Other Electronic Component Manufacturing	259	\$57,699	0.45	27	5.7%	102	43	74	-15	-1.2%
3111	Animal Food Manufacturing	256	\$49,305	2.61	-3	-0.6%	142	53	88	1	0.1%
3152	Cut and Sew Apparel Manufacturing	157	\$26,677	0.96	16	5.6%	47	38	40	-31	-4.3%
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	130	\$39,262	1.03	35	16.9%	77	27	45	5	0.7%
3221	Pulp, Paper, and Paperboard Mills	129	\$66,724	0.89	-89	-23.1%	46	22	40	-17	-2.7%
3332	Industrial Machinery Manufacturing	128	\$53,556	0.69	13	5.3%	47	21	38	-11	-1.8%
3359	Other Electrical Equipment and Component Manufacturing	109	\$57,673	0.48	34	20.7%	52	20	35	-4	-0.7%
3329	Other Fabricated Metal Product Manufacturing	100	\$53,113	0.23	0	0.1%	53	18	33	2	0.3%
3379	Other Furniture Related Product Manufacturing	88	\$37,964	1.55	-9	-4.7%	44	19	28	-3	-0.7%

3372	Office Furniture (including Fixtures) Manufacturing	80	\$37,409	0.47	19	14.7%	40	16	25	-1	-0.3%
3259	Other Chemical Product and Preparation Manufacturing	78	\$63,697	0.59	-19	-10.4%	30	13	25	-8	-2.0%
3272	Glass and Glass Product Manufacturing	65	\$31,955	0.48	29	34.9%	28	13	21	-6	-1.9%
3112	Grain and Oilseed Milling	52	\$84,034	0.57	-8	-7.0%	31	11	19	2	0.6%
3133	Textile and Fabric Finishing and Fabric Coating Mills	45	\$43,216	0.97	16	25.2%	18	9	14	-6	-2.7%
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	37	\$54,094	0.67	10	17.4%	15	6	12	-3	-1.7%
3312	Steel Product Manufacturing from Purchased Steel	37	\$56,951	0.42	22	57.9%	19	7	13	0	-0.1%
3341	Computer and Peripheral Equipment Manufacturing	34	\$93,194	0.14	7	11.2%	13	4	9	-1	-0.6%
3149	Other Textile Product Mills	21	\$25,137	0.21	-106	-59.2%	9	5	6	-2	-1.8%
3331	Agriculture, Construction, and Mining Machinery Manufacturing	15	\$70,317	0.04	0	1.1%	8	3	5	0	0.6%
3271	Clay Product and Refractory Manufacturing	11	\$25,681	0.17	-9	-26.0%	6	2	4	0	0.1%
3353	Electrical Equipment Manufacturing	3	\$35,900	0.02	-21	-62.8%	2	1	1	0	-0.1%
3369	Other Transportation Equipment Manufacturing	2	\$43,060	0.04	-2	-25.9%	1	0	1	0	0.5%
3315	Foundries	1	\$29,931	0.01	0	0.9%	1	0	0	0	0.7%
3333	Commercial and Service Industry Machinery Manufacturing	1	\$31,323	0.01	0	0.9%	1	0	0	0	0.7%
3364	Aerospace Product and Parts Manufacturing	1	\$36,136	0.00	0	0.9%	0	0	0	0	0.7%
3366	Ship and Boat Building	1	\$36,136	0.00	0	0.9%	1	0	0	0	0.7%
	GO Virginia Light Manufacturing	20,266	\$47,597	1.51	244	0.6%	0	0	0	-688	-0.7%

	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
	Source: JobsEQ®										
	Data as of 2019Q1										
	Note: Figures may not sum due to rounding.										

Industry Snapshot of GO Virginia Transportation and Logistics in GO Virginia Region 8, 2019q1											
		Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl		Separations (Approximate)		Growth	
NAICS	Industry	Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
4931	Warehousing and Storage	5,620	\$42,909	3.17	379	3.5%	4,144	1,347	2,165	632	2.2%
4841	General Freight Trucking	3,259	\$55,223	1.78	-122	-1.8%	1,786	680	1,046	60	0.4%
5416	Management, Scientific, and Technical Consulting Services	1,093	\$61,309	0.41	58	2.8%	613	187	325	100	1.8%
4921	Couriers and Express Delivery Services	974	\$39,304	0.93	-23	-1.2%	603	218	356	28	0.6%
4842	Specialized Freight Trucking	895	\$46,387	1.22	-23	-1.3%	500	191	293	17	0.4%
4812	Nonscheduled Air Transportation	450	\$68,456	5.77	144	21.3%	181	75	128	-22	-1.0%
5619	Other Support Services	312	\$28,640	0.56	89	18.4%	183	74	100	8	0.5%
4884	Support Activities for Road Transportation	272	\$33,952	1.30	-17	-2.9%	173	62	90	21	1.5%
4821	Rail Transportation	244	\$77,438	0.75	-3	-0.5%	102	36	74	-8	-0.7%
4881	Support Activities for Air Transportation	141	\$48,473	0.34	37	16.6%	87	29	45	13	1.8%
4885	Freight Transportation Arrangement	134	\$43,091	0.35	20	8.5%	72	26	41	5	0.8%
4855	Charter Bus Industry	133	\$28,383	2.84	30	13.5%	78	44	32	1	0.2%
4889	Other Support Activities for Transportation	102	\$34,724	1.73	44	32.5%	51	25	35	-9	-1.7%
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	100	\$67,519	0.38	-1	-0.4%	62	20	34	8	1.6%
4859	Other Transit and Ground Passenger Transportation	98	\$19,370	0.40	25	16.1%	67	33	24	10	2.0%

4862	Pipeline Transportation of Natural Gas	44	\$112,895	0.97	29	67.3%	20	7	14	-1	-0.4%
4811	Scheduled Air Transportation	7	\$47,337	0.01	-7	-29.3%	4	1	2	0	0.6%
4882	Support Activities for Rail Transportation	5	\$45,739	0.09	-1	-9.9%	3	1	2	0	0.7%
4883	Support Activities for Water Transportation	4	\$18,287	0.02	0	0.9%	2	1	1	0	0.7%
4831	Deep Sea, Coastal, and Great Lakes Water Transportation	2	\$20,343	0.04	0	0.9%	1	0	1	0	0.9%
4832	Inland Water Transportation	1	\$20,343	0.03	0	0.9%	1	0	0	0	0.9%
	GO Virginia Transportation and Logistics	13,892	\$48,242	1.18	659	2.5%	0	0	0	883	1.2%
	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
	Source: JobsEQ®										
	Data as of 2019Q1										
	Note: Figures may not sum due to rounding.										

Industry Snapshot of GO Virginia Biomedical Biotechnical in GO Virginia Region 8, 2019q1											
		Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl		Separations (Approximate)		Growth	
NAICS	Industry	Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
3254	Pharmaceutical and Medicine Manufacturing	1,029	\$96,013	2.27	126	6.7%	509	172	323	14	0.3%
3391	Medical Equipment and Supplies Manufacturing	535	\$65,062	1.08	-31	-2.8%	274	102	170	2	0.1%
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	266	\$67,782	0.42	68	15.8%	104	42	74	-12	-0.9%
5417	Scientific Research and Development Services	257	\$94,997	0.23	31	6.7%	130	37	73	19	1.5%
5622	Waste Treatment and Disposal	254	\$35,773	1.42	0	-0.1%	102	46	79	-23	-1.9%
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	187	\$73,529	0.18	-51	-11.4%	86	32	57	-3	-0.4%
6215	Medical and Diagnostic Laboratories	109	\$55,910	0.25	31	18.0%	60	21	26	13	2.3%
3333	Commercial and Service Industry Machinery Manufacturing	1	\$31,323	0.01	0	0.9%	1	0	0	0	0.7%
	GO Virginia Biomedical Biotechnical	2,638	\$77,709	0.59	172	3.4%	0	0	0	14	0.1%
	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
	Source: JobsEQ®										
	Data as of 2019Q1										
	Note: Figures may not sum due to rounding.										

Industry Snapshot of GO Virginia Finance and Business Service in GO Virginia Region 8, 2019q1											
		Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl		Separations (Approximate)		Growth	
NAICS	Industry	Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
5221	Depository Credit Intermediation	3,737	\$48,903	1.43	335	4.8%	1,863	709	1,125	29	0.2%
3231	Printing and Related Support Activities	2,780	\$39,565	4.05	-73	-1.3%	1,244	594	872	-222	-1.6%
5413	Architectural, Engineering, and Related Services	1,790	\$70,351	0.73	145	4.3%	849	274	486	89	1.0%
5419	Other Professional, Scientific, and Technical Services	1,561	\$39,842	0.93	54	1.8%	818	306	423	90	1.1%
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	1,106	\$46,270	0.64	-83	-3.5%	564	221	315	29	0.5%
5416	Management, Scientific, and Technical Consulting Services	1,093	\$61,309	0.41	58	2.8%	613	187	325	100	1.8%
5411	Legal Services	989	\$55,407	0.53	28	1.4%	379	171	217	-8	-0.2%
5415	Computer Systems Design and Related Services	983	\$78,323	0.29	-68	-3.3%	483	119	270	93	1.8%
5242	Agencies, Brokerages, and Other Insurance Related Activities	963	\$51,997	0.48	53	2.9%	516	195	279	41	0.8%
5313	Activities Related to Real Estate	862	\$45,855	0.65	44	2.6%	509	202	228	78	1.8%
5311	Lessors of Real Estate	579	\$30,640	0.58	4	0.4%	292	137	167	-12	-0.4%
5191	Other Information Services	478	\$43,060	0.66	-96	-8.7%	326	83	151	92	3.6%
5222	Nondepository Credit Intermediation	439	\$65,659	0.46	57	7.2%	259	81	137	42	1.8%
5241	Insurance Carriers	361	\$58,715	0.20	8	1.1%	155	61	100	-6	-0.4%

5418	Advertising, Public Relations, and Related Services	301	\$43,193	0.37	50	9.4%	158	61	95	1	0.1%
5231	Securities and Commodity Contracts Intermediation and Brokerage	267	\$140,533	0.38	14	2.7%	113	39	79	-5	-0.4%
5239	Other Financial Investment Activities	197	\$73,013	0.24	12	3.2%	104	32	57	16	1.5%
5414	Specialized Design Services	153	\$35,616	0.46	5	1.8%	75	29	42	4	0.5%
5182	Data Processing, Hosting, and Related Services	133	\$61,332	0.24	4	1.4%	66	20	39	8	1.2%
5223	Activities Related to Credit Intermediation	124	\$71,487	0.26	43	24.1%	76	24	39	12	1.9%
5259	Other Investment Pools and Funds	8	\$86,409	0.56	5	78.9%	4	1	2	0	0.7%
5251	Insurance and Employee Benefit Funds	7	\$42,129	0.74	0	-1.4%	4	1	2	0	0.8%
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	3	\$70,100	0.10	-3	-26.6%	2	1	1	0	-0.2%
	GO Virginia Finance and Business Service	18,913	\$52,730	0.66	598	1.6%	0	0	0	505	0.5%
	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
	Source: JobsEQ®										
	Data as of 2019Q1										
	Note: Figures may not sum due to rounding.										

Industry Snapshot of GO Virginia Information Technology and Communications in GO Virginia Region 8, 2019q1											
		Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl		Separations (Approximate)		Growth	
NAICS	Industry	Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
517911	Telecommunications Resellers	509	\$44,416	6.55	248	39.6%	180	80	154	-53	-2.2%
511210	Software Publishers	478	\$89,129	0.74	-34	-3.4%	232	59	134	39	1.6%
541512	Computer Systems Design Services	470	\$85,763	0.29	-86	-8.1%	231	57	129	44	1.8%
541511	Custom Computer Programming Services	421	\$78,650	0.28	33	4.1%	206	51	116	39	1.8%
541611	Administrative Management and General Management Consulting Services	364	\$64,740	0.32	-45	-5.7%	202	62	108	31	1.7%
517311	Wired Telecommunications Carriers	331	\$61,942	0.40	-51	-6.9%	132	51	103	-23	-1.4%
541715	Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	216	\$71,582	0.32	75	24.0%	109	31	61	17	1.6%
541614	Process, Physical Distribution, and Logistics Consulting Services	200	\$62,928	0.92	88	33.9%	118	35	61	22	2.1%
334417	Electronic Connector Manufacturing	188	\$61,686	5.64	4	1.1%	73	31	53	-11	-1.2%
334515	Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals	184	\$90,224	3.09	90	39.7%	70	29	51	-10	-1.1%
541690	Other Scientific and Technical Consulting Services	149	\$65,325	0.43	-8	-2.7%	85	26	44	15	1.9%

541613	Marketing Consulting Services	145	\$44,110	0.29	-10	-3.3%	77	25	42	11	1.4%
518210	Data Processing, Hosting, and Related Services	133	\$61,332	0.24	4	1.4%	66	20	39	8	1.2%
541618	Other Management Consulting Services	126	\$60,552	0.71	65	44.0%	69	21	37	10	1.6%
423610	Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	116	\$56,387	0.43	9	4.1%	55	21	37	-2	-0.4%
541519	Other Computer Related Services	79	\$63,457	0.42	-1	-0.6%	40	10	22	9	2.2%
334419	Other Electronic Component Manufacturing	71	\$47,610	0.74	23	21.6%	28	12	20	-4	-1.2%
333241	Food Product Machinery Manufacturing	69	\$57,489	2.25	-7	-4.5%	27	11	21	-5	-1.6%
541612	Human Resources Consulting Services	66	\$58,648	0.47	-34	-18.8%	38	11	20	7	1.9%
561621	Security Systems Services (except Locksmiths)	64	\$43,044	0.29	-1	-0.9%	39	13	21	4	1.2%
335921	Fiber Optic Cable Manufacturing	62	\$60,049	3.34	34	49.3%	28	12	20	-3	-0.9%
423430	Computer and Computer Peripheral Equipment and Software Merchant Wholesalers	54	\$79,745	0.16	8	8.0%	22	9	16	-3	-1.2%
423690	Other Electronic Parts and Equipment Merchant Wholesalers	53	\$68,538	0.24	-8	-6.8%	24	10	17	-2	-0.8%
517312	Wireless Telecommunications Carriers (except Satellite)	51	\$52,188	0.29	27	46.1%	22	9	16	-3	-1.1%
333249	Other Industrial Machinery Manufacturing	50	\$55,475	0.57	22	34.8%	18	8	15	-5	-2.1%
423440	Other Commercial Equipment Merchant Wholesalers	47	\$88,614	0.54	-17	-14.5%	25	8	15	1	0.6%
335931	Current-Carrying Wiring Device Manufacturing	46	\$55,301	0.89	0	0.2%	23	9	15	-1	-0.3%

541620	Environmental Consulting Services	43	\$52,101	0.29	3	3.3%	24	7	13	4	1.8%
334510	Electromedical and Electrotherapeutic Apparatus Manufacturing	41	\$92,719	0.39	16	28.4%	18	7	12	0	-0.1%
541714	Research and Development in Biotechnology (except Nanobiotechnology)	39	\$105,740	0.13	-11	-12.1%	18	5	11	2	1.0%
334118	Computer Terminal and Other Computer Peripheral Equipment Manufacturing	34	\$93,846	0.60	7	11.3%	12	4	9	-1	-0.6%
423420	Office Equipment Merchant Wholesalers	26	\$50,820	0.20	-24	-28.1%	12	4	8	-1	-0.6%
423490	Other Professional Equipment and Supplies Merchant Wholesalers	23	\$69,715	0.46	-14	-21.0%	11	4	7	0	-0.3%
423450	Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers	18	\$58,412	0.05	6	23.9%	8	3	5	0	-0.3%
517919	All Other Telecommunications	16	\$69,655	0.32	13	123.9%	5	2	5	-2	-2.7%
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	14	\$91,385	0.07	-42	-49.9%	6	2	4	-1	-0.8%
334512	Automatic Environmental Control Manufacturing for Residential, Commercial, and Appliance Use	13	\$64,897	0.51	2	10.9%	5	2	4	-1	-1.2%
541513	Computer Facilities Management Services	12	\$61,879	0.10	-13	-30.3%	6	1	3	1	1.2%
334519	Other Measuring and Controlling Device Manufacturing	10	\$73,651	0.18	9	174.5%	4	2	3	0	-1.0%
423460	Ophthalmic Goods Merchant Wholesalers	10	\$49,006	0.28	1	5.9%	4	2	3	0	-0.6%

423410	Photographic Equipment and Supplies Merchant Wholesalers	9	\$56,452	0.41	-10	-31.8%	4	2	3	0	-0.3%
333243	Sawmill, Woodworking, and Paper Machinery Manufacturing	5	\$66,308	0.26	-2	-15.1%	2	1	2	0	-1.7%
333244	Printing Machinery and Equipment Manufacturing	3	\$37,974	0.27	-1	-14.2%	1	0	1	0	-2.2%
334513	Instruments and Related Products Manufacturing for Measuring, Displaying, and Controlling Industrial Process Variables	3	\$62,283	0.03	-7	-45.4%	1	0	1	0	-0.5%
335312	Motor and Generator Manufacturing	2	\$40,794	0.04	-21	-70.5%	1	0	1	0	-0.7%
541720	Research and Development in the Social Sciences and Humanities	2	\$31,464	0.02	-19	-70.4%	1	0	1	0	0.1%
335314	Relay and Industrial Control Manufacturing	1	\$28,768	0.01	0	0.9%	0	0	0	0	0.7%
335999	All Other Miscellaneous Electrical Equipment and Component Manufacturing	1	\$28,768	0.02	0	-8.9%	0	0	0	0	0.7%
334516	Analytical Laboratory Instrument Manufacturing	0	n/a	0.00	-1	n/a	0	0	0	0	0.4%
541713	Research and Development in Nanotechnology	0	n/a	0.00	-14	n/a	0	0	0	0	0.7%
	GO Virginia Information Technology and Communications	5,070	\$67,771	0.38	303	3.1%	0	0	0	148	0.6%
	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
	Source: JobsEQ®										
	Data as of 2019Q1										
	Note: Figures may not sum due to rounding.										

Industry Snapshot of GO Virginia Value-Added Food Manufacturing in GO Virginia Region 8, 2019q1											
		Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl		Separations (Approximate)		Growth	
NAICS	Industry	Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
4931	Warehousing and Storage	5,620	\$42,909	3.17	379	3.5%	4,144	1,347	2,165	632	2.2%
3116	Animal Slaughtering and Processing	5,289	\$36,901	6.62	-16	-0.2%	3,161	1,197	1,960	5	0.0%
1120	Animal Production (Proprietors)	2,070	\$36,529	2.88	-320	-6.9%	810	604	161	45	0.4%
3115	Dairy Product Manufacturing	1,339	\$58,074	5.94	66	2.6%	840	302	484	54	0.8%
3119	Other Food Manufacturing	1,106	\$47,600	3.07	-75	-3.2%	680	254	397	29	0.5%
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	1,080	\$55,151	1.00	-31	-1.4%	575	207	348	20	0.4%
3113	Sugar and Confectionery Product Manufacturing	1,047	\$37,198	8.77	65	3.3%	570	245	371	-45	-0.9%
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	937	\$44,258	3.55	87	5.0%	519	206	333	-20	-0.4%
3121	Beverage Manufacturing	881	\$33,079	2.13	93	5.7%	540	201	319	20	0.5%
1110	Crop Production (Proprietors)	737	\$30,949	1.72	-9	-0.6%	330	197	101	31	0.8%
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	660	\$37,032	1.23	9	0.7%	315	133	222	-40	-1.2%
3118	Bakeries and Tortilla Manufacturing	616	\$40,733	1.23	111	10.4%	399	172	230	-2	-0.1%
3111	Animal Food Manufacturing	256	\$49,305	2.61	-3	-0.6%	142	53	88	1	0.1%
4245	Farm Product Raw Material Merchant Wholesalers	134	\$20,994	1.19	23	9.7%	62	28	48	-14	-2.2%

3332	Industrial Machinery Manufacturing	128	\$53,556	0.69	13	5.3%	47	21	38	-11	-1.8%
1151	Support Activities for Crop Production	124	\$24,268	0.22	-12	-4.4%	93	25	63	5	0.8%
3112	Grain and Oilseed Milling	52	\$84,034	0.57	-8	-7.0%	31	11	19	2	0.6%
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	37	\$54,094	0.67	10	17.4%	15	6	12	-3	-1.7%
3331	Agriculture, Construction, and Mining Machinery Manufacturing	15	\$70,317	0.04	0	1.1%	8	3	5	0	0.6%
	GO Virginia Value-Added Food Manufacturing	22,128	\$41,420	2.55	382	0.9%	0	0	0	739	0.7%
	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
Source: JobsEQ®											
Data as of 2019Q1											
Note: Figures may not sum due to rounding.											

Industry Snapshot of GO Virginia Health Care in GO Virginia Region 8, 2019q1											
		Current			2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1			Total Change	Avg Ann % Chg in Empl		Separations (Approximate)		Growth	
NAICS	Industry	Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
6221	General Medical and Surgical Hospitals	8,611	\$58,234	0.95	-379	-2.1%	3,460	1,615	1,706	139	0.3%
6211	Offices of Physicians	4,328	\$86,057	1.03	620	8.0%	2,166	831	958	377	1.7%
6241	Individual and Family Services	3,948	\$24,922	0.94	-478	-5.5%	3,263	1,294	1,259	710	3.4%
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	3,509	\$27,273	2.39	255	3.8%	2,810	1,140	1,112	558	3.0%
6231	Nursing Care Facilities (Skilled Nursing Facilities)	2,084	\$31,365	0.82	15	0.4%	1,044	541	528	-25	-0.2%
6213	Offices of Other Health Practitioners	1,669	\$42,649	0.99	142	4.6%	946	343	388	215	2.5%
6216	Home Health Care Services	1,409	\$30,073	0.57	202	8.0%	1,085	417	372	296	3.9%
4461	Health and Personal Care Stores	1,381	\$32,855	0.81	-14	-0.5%	824	358	429	38	0.5%
6212	Offices of Dentists	1,334	\$54,547	0.90	92	3.6%	708	305	296	106	1.5%
6222	Psychiatric and Substance Abuse Hospitals	989	\$41,720	2.58	-156	-7.1%	193	185	213	-205	-4.5%
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	927	\$30,228	0.81	-16	-0.9%	643	282	283	77	1.6%
6214	Outpatient Care Centers	762	\$51,504	0.50	230	19.7%	445	151	188	107	2.7%
3391	Medical Equipment and Supplies Manufacturing	535	\$65,062	1.08	-31	-2.8%	274	102	170	2	0.1%
8122	Death Care Services	381	\$35,518	1.53	-28	-3.5%	228	109	121	-2	-0.1%

6219	Other Ambulatory Health Care Services	346	\$35,516	0.66	17	2.6%	179	55	86	38	2.1%
5322	Consumer Goods Rental	285	\$34,016	1.22	-36	-5.8%	140	65	94	-19	-1.4%
6239	Other Residential Care Facilities	267	\$28,926	0.96	69	16.3%	131	70	81	-20	-1.6%
6215	Medical and Diagnostic Laboratories	109	\$55,910	0.25	31	18.0%	60	21	26	13	2.3%
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	75	\$39,954	0.18	75	n/a	46	15	17	14	3.5%
	GO Virginia Health Care	32,947	\$47,368	0.95	609	0.9%	0	0	0	2,535	1.5%
	Total - All Industries	240,574	\$41,052	1.00	4,195	0.9%	140,124	57,011	76,035	7,078	0.6%
	Source: JobsEQ®										
	Data as of 2019Q1										
	Note: Figures may not sum due to rounding.										

Occupation Snapshot in GO Virginia - Region 8, 2019q1														
		Current						2-Year History		5-Year Forecast				
		Four Quarters Ending with 2019q1						Total Change	Avg Ann % Chg in Empl		Separations		Growth	
SOC	Title	Empl	Avg Ann Wage s ¹	LQ	Unempl	Unempl Rate	Online Job Ads ²	Empl	Region	Total New Demand	Exits	Transfers	Empl	Avg Ann Rate
43-0000	Office and Administrative Support Occupations	30,490	\$34,700	0.89	818	2.5%	1,439	851	1.4%	17,168	7,857	9,294	17	0.0%
41-0000	Sales and Related Occupations	24,387	\$35,400	1.01	920	3.6%	2,153	66	0.1%	17,774	7,789	9,662	323	0.3%
51-0000	Production Occupations	21,271	\$37,400	1.47	661	2.9%	535	312	0.7%	11,335	4,414	7,423	502	0.5%
35-0000	Food Preparation and Serving Related Occupations	21,145	\$23,300	1.02	1,124	4.5%	2,104	36	0.1%	19,353	8,261	10,291	801	0.7%
53-0000	Transportation and Material Moving Occupations	20,184	\$35,500	1.22	792	3.5%	1,463	276	0.7%	13,186	5,016	7,468	702	0.7%
25-0000	Education, Training, and Library Occupations	15,584	\$52,200	1.16	323	2.2%	573	118	0.4%	7,286	3,424	3,300	562	0.7%
11-0000	Management Occupations	13,580	\$105,300	0.92	152	1.1%	718	-25	-0.1%	5,808	2,252	3,062	494	0.7%
29-0000	Healthcare Practitioners and Technical Occupations	13,028	\$77,100	0.94	125	1.0%	1,107	327	1.3%	4,283	1,803	1,765	715	1.1%

47-0000	Construction and Extraction Occupations	11,590	\$42,100	1.04	606	4.1%	315	499	2.2%	6,729	2,119	3,980	630	1.1%
49-0000	Installation, Maintenance, and Repair Occupations	10,504	\$45,700	1.13	231	1.8%	670	255	1.2%	5,404	1,876	3,188	341	0.6%
13-0000	Business and Financial Operations Occupations	10,196	\$68,500	0.81	198	2.0%	340	358	1.8%	5,049	1,559	3,104	386	0.7%
37-0000	Building and Grounds Cleaning and Maintenance Occupations	9,690	\$26,100	1.17	429	3.8%	566	305	1.6%	6,575	3,050	3,162	363	0.7%
39-0000	Personal Care and Service Occupations	9,350	\$24,200	0.89	336	3.2%	465	-141	-0.7%	8,170	3,793	3,522	855	1.8%
31-0000	Healthcare Support Occupations	6,251	\$29,300	0.95	150	2.3%	397	220	1.8%	4,320	1,899	1,879	543	1.7%
15-0000	Computer and Mathematical Occupations	4,507	\$77,800	0.64	75	1.6%	328	90	1.0%	1,746	400	1,120	226	1.0%
33-0000	Protective Service Occupations	4,099	\$42,800	0.79	88	2.0%	200	130	1.6%	2,132	986	1,093	53	0.3%
21-0000	Community and Social Service Occupations	3,862	\$46,000	0.97	58	1.6%	547	160	2.1%	2,418	818	1,352	247	1.2%
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	3,273	\$48,100	0.77	70	2.3%	230	-23	-0.4%	1,641	690	903	48	0.3%
17-0000	Architecture and Engineering Occupations	2,881	\$79,100	0.71	42	1.5%	195	202	3.7%	1,144	373	682	89	0.6%
45-0000	Farming, Fishing, and Forestry Occupations	1,848	\$26,500	1.19	115	5.8%	24	44	1.2%	1,369	341	1,022	6	0.1%
19-0000	Life, Physical, and Social Science Occupations	1,525	\$64,300	0.80	27	1.9%	90	86	2.9%	734	206	479	49	0.6%
23-0000	Legal Occupations	1,329	\$79,500	0.66	16	1.3%	21	48	1.9%	470	176	253	41	0.6%
00-0000	Total - All Occupations	240,574	\$44,100	1.00	n/a	n/a	14,479	4,195	0.9%	144,182	59,102	78,002	7,078	0.6%

Source: JobsEQ®													
Data as of 2019Q1 unless noted otherwise													
Note: Figures may not sum due to rounding.													
1. Occupation wages are as of 2018 and should be taken as the average for all Covered Employment													
2. Data represent found online ads active within the last thirty days in the selected region; data represents a sampling rather than the complete universe of postings.													
Ads lacking zip code information but designating a place (city, town, etc.) may be assigned to the zip code with greatest employment in that place for queries in this analytic.													
Due to alternative county-assignment algorithms, ad counts in this analytic may not match that shown in RTI (nor in the popup window ad list).													

	Average Annual Wage Growth		
GO Virginia Region 8	by Industry - 2019Q1		
Industry	Avg Ann Wages per Worker	% Change in Avg Ann Wages 2018-2019	% Change in Avg Ann Wages 2017-2019
Total - All Industries	\$41,052	2.8%	4.9%
Agriculture, Forestry, Fishing and Hunting (11)	\$33,953	4.1%	6.9%
Mining, Quarrying, and Oil and Gas Extraction (21)	\$58,153	5.5%	16.0%
Utilities (22)	\$62,198	0.0%	1.5%
Construction (23)	\$43,881	3.4%	5.9%
Manufacturing (31)	\$53,847	5.7%	6.0%
Wholesale Trade (42)	\$52,861	3.5%	5.6%
Retail Trade (44)	\$27,193	2.9%	4.1%
Transportation and Warehousing (48)	\$48,000	4.4%	6.5%
Information (51)	\$53,422	4.5%	15.7%
Finance and Insurance (52)	\$58,531	1.2%	5.9%
Real Estate and Rental and Leasing (53)	\$43,474	1.5%	5.3%
Professional, Scientific, and Technical Services (54)	\$56,915	0.8%	2.1%
Management of Companies and Enterprises (55)	\$107,930	-1.2%	7.0%
Administrative and Support and Waste Management and Remediation Services (56)	\$29,187	-0.6%	0.4%

Educational Services (61)	\$37,506	3.0%	5.2%
Health Care and Social Assistance (62)	\$47,030	0.5%	3.3%
Arts, Entertainment, and Recreation (71)	\$23,341	9.1%	16.0%
Accommodation and Food Services (72)	\$17,942	3.4%	5.3%
Other Services (except Public Administration) (81)	\$26,142	0.8%	2.1%
Public Administration (92)	\$53,830	2.8%	5.2%
Unclassified (99)	\$29,362	-5.8%	-13.1%
<i>Source: JobsEQ®</i>			

Virginia Business Ready Sites Program Site Characterizations Report Summary

CSPDC Sites		Locality	Tier	Acres	Tier 1 to Tier 2	Tier 2 to Tier 3	Tier 3 to Tier 4	Tier 4 to Tier 5	Cumulative
1	Argenbright Site	Augusta County	1	88	60,000	140,000	180,000	1,620,000	\$ 2,000,000
2	Greenville Property	Augusta County	1	111.3	50,000	150,000	230,000	2,070,000	\$ 2,500,000
3	Martin Site	Augusta County	1	800	120,000	800,000	1,000,000	9,000,000	\$ 10,920,000
4	Meg Site	Augusta County	2	258.03		400,000	550,000	4,950,000	\$ 5,900,000
5A	Wilson Commerce Park - Business Parcel	Augusta County	2	10.93		40,000	50,000	450,000	\$ 540,000
5B	Wilson Commerce Park - Industrial Parcel	Augusta County	2	110		200,000	240,000	2,160,000	\$ 2,600,000
6	Bath County Industrial Park	Bath County	2	74.4		120,000	230,000	2,070,000	\$ 2,420,000
7	Rockbridge Regional Industrial Park	Buena Vista	2	35		50,000	80,000	720,000	\$ 850,000
8	Acorn LC Industrial Park	Harrisonburg	2	43		40,000	100,000	900,000	\$ 1,040,000
9A N	Holland Property - (Zoned A-2 - North of US 60)	Rockbridge	1	32	50,000	75,000	100,000	900,000	\$ 1,125,000
9A S	Holland Property - (Zoned A-2 - South of US 60)	Rockbridge	1	76	50,000	75,000	100,000	900,000	\$ 1,125,000
9B N	Holland Property - (Zoned B-2 - North of US 60)	Rockbridge	2	59		120,000	170,000	1,530,000	\$ 1,820,000
9B S	Holland Property - (Zoned B-2 - South of US 60)	Rockbridge	2	210		380,000	550,000	4,950,000	\$ 5,880,000
10	Innovation Village	Rockingham County	2	320		300,000	550,000	4,950,000	\$ 5,800,000
11	Shenandoah Valley Industrial Park South Campus	Rockingham County	2	345		400,000	420,000	3,780,000	\$ 4,600,000
12	Green Hill Industry and Technology Center	Staunton	2	95.3		150,000	250,000	2,250,000	\$ 2,650,000
13	Outlet Village Park	Waynesboro	2	83		125,000	160,000	1,440,000	\$ 1,725,000
14	Waynesboro Commerce and Industry Park	Waynesboro	2	17		45,000	50,000	450,000	\$ 545,000
15	Waynesboro Town Center Commercial Park	Waynesboro	2	11		35,000	45,000	405,000	\$ 485,000
				2,778.96	\$ 330,000	\$ 3,645,000	\$ 5,055,000	\$ 45,495,000	\$ 54,525,000

NSVRC Sites		Locality	Tier	Acres	Tier 1 to Tier 2	Tier 2 to Tier 3	Tier 3 to Tier 4	Tier 4 to Tier 5	Cumulative	
1	Artillery Business Park	Frederick County	2	45		150,000	200,000	1,800,000	\$ 2,150,000	
2	Carbaugh Tract	Frederick County	2	107		120,000	280,000	2,520,000	\$ 2,920,000	
3	Carroll Industrial Park	Frederick County	2	77		30,000	45,000	405,000	\$ 480,000	
4	Graystone Business Park	Frederick County	4	270				3,900,000	\$ 3,900,000	
5	Avtex	Warren County	2	433		3,000	210,000	1,890,000	\$ 2,103,000	
6	Crooked Run Center Phase II	Warren County	2	68		50,000	150,000	1,350,000	\$ 1,550,000	
7	Happy Creek Technology Park	Warren County	2	146		250,000	270,000	2,430,000	\$ 2,950,000	
8	Jett Farm	Warren County	2	522		700,000	1,000,000	9,000,000	\$ 10,700,000	
9	Mt. Jackson	Shenandoah County	2	42		83,000	327,000	2,943,000	\$ 3,353,000	
10	North Shenandoah (Strasburg)	Shenandoah County	2	42		93,200	378,000	3,402,000	\$ 3,873,200	
					1,752.00	\$ -	\$ 1,479,200	\$ 2,860,000	\$ 29,640,000	\$ 33,979,200
July 2018					4,530.96	\$ 330,000	\$ 5,124,200	\$ 7,915,000	\$ 75,135,000	\$ 88,504,200

Blue Ridge Community College			
2018 YTD Credential Summary July 1, 2017 - April 30, 2018		2019 YTD Credential Summary July 1, 2018 - April 30, 2019	
		Advanced Emergency Medical Technician (AEMT)	5
Basic Life Support for Healthcare	53	Basic Life Support for Healthcare	76
Certified Logistics Associate	5		
Certified Logistics Technician	4		
Certified Nurse Aide (CNA)	22	Certified Nurse Aide (CNA)	17
Certified Professional Coder (CPC)	2		
		Certified Welder (CW)	2
Clinical Medical Assistant	27	Clinical Medical Assistant	24
Commercial Driver's License Class A Endorsement	72	Commercial Driver's License Class A Endorsement	68
Commercial Driver's License Class B Endorsement	13	Commercial Driver's License Class B Endorsement	11
CompTIA A+ Certification	1	CompTIA Security+ Certification	2
CompTIA Security+ Certification	1		
Customer Services and Sales Certification	4		
Electrical Tradesman License Renewal	4	Electrical Tradesman License Renewal	4
		Emergency Medical Technician	4
		Flux Core Arc Welding (FCAW)	29
Gas Fitter Tradesman License Renewal	5	Gas Fitter Tradesman License Renewal	3
Gas Tungsten Arc Welding (GTAW)	15	Gas Tungsten Arc Welding (GTAW)	8
HVAC Tradesman License Renewal	9	HVAC Tradesman License Renewal	2
		IPC-A-610 Certification	4
Job Planning, Benchwork, and Layout	7	Job Planning, Benchwork, and Layout	11
		JSTD-001 Certification	4
Machining Level I: Drill Press Skills I	9		
Manual Milling Skills 1, Machining	5	Manual Milling Skills 1, Machining	5
Measurement, Materials, and Safety	14	Measurement, Materials, and Safety	12
Medical Assistant	11	Medical Assistant	4
Pharmacy Technician	14	Pharmacy Technician	25
Phlebotomy Technician (NCCT)	26	Phlebotomy Technician (NCCT)	21
Phlebotomy Technician (PBT)	5		
Plumbing Tradesman License Renewal	6	Plumbing Tradesman License Renewal	7
Registered Medical Assistant (RMA)	6	Registered Medical Assistant (RMA)	4
Shielded Metal Arc Welding (SMAW)	89	Shielded Metal Arc Welding (SMAW)	48
Turning Operations: Turning Between Centers	3	Turning Operations: Turning Between Centers	4
		Turning Operations: Turning Chucking Skills	4

Dabney Lancaster Community College			
2018 YTD Credential Summary July 1, 2017 - April 30, 2018		2019 YTD Credential Summary July 1, 2018 - April 30, 2019	
Certified Nurse Aid (CNA)	2	Certified Nurse Aid (CNA)	10
		Clinical Medical Assistant (CMA)	26
Commercial Driver's License - Class A Endorsement	22	Commercial Driver's License - Class A Endorsement	21
Emergency Medical Technician (EMT)	2	Emergency Medical Technician (EMT)	
		Flux Core Arc Welding (FCAW)	3
		Gas Metal Arc Welding (GMAW)	3
		Gas Tungsten Arc Welding (GTAW)	2
		HVAC Level 1	7
		HVAC Level 2	7
Millwright - Level 3	8		
		Millwright - Level 4	11
		Millwright - Level 5	11
		NCCER Core Curriculum - Introductory Craft Skills	6
Phlebotomy Technician	22		
		Pharmacy Technician	1
		Shielded Metal Arc Welding (SMAW)	1
BLS Healthcare Provider/CPR	65	BLS Healthcare Provider/CPR	56

Lord Fairfax Community College			
2018 YTD Credential Summary July 1, 2017 - April 30, 2018		2019 YTD Credential Summary July 1, 2018 - April 30, 2019	
Credential	Total to Date	Credential	Total to Date
Basic Life Support for Healthcare	22	Basic Life Support for Healthcare	51
Certified Medical Administrative Assistant	18	Certified Medical Administrative Assistant	12
Certified Medical Assistant	3		
Certified Nurse Aid	8	Certified Nurse Aid	10
Certified Phlebotomy Technician	31	Certified Phlebotomy Technician	24
Clinical Medical Assistant	64	Clinical Medical Assistant	55
Commercial Drivers License (CDL)	1		
Commercial Drivers License Class A Endorsement	150	Commercial Drivers License Class A Endorsement	115
Comp TIA A+ Certification	2		
		Comp TIA IT Fundamentals	4
Construction Project Management	9	Construction Project Management	8
Contractor's License	2	Contractor's License	1
Core Introductory Craft Skills	60	Core Introductory Craft Skills	90
Dealer Operator License	54		
Electrical - Level 1	19	Electrical - Level 1	37
Electrical - Level 2	7	Electrical - Level 2	24
Electrical - Level 3	10	Electrical - Level 3	19
Electrical - Level 4	6	Electrical - Level 4	9
Electrical Tradesman License Renewal	37	Electrical Tradesman License Renewal	48
Excel 2013 MOS	5		
		Fundamental Payroll Certification (FPC)	3
Gas Fitter Tradesman License R	14	Gas Fitter Tradesman License R	17
		Gas Metal Arc Welding (GMAW)	1
		Gas Tungsten Arc Welding (GTAW)	1
Heartsaver CPR/AED	16		
Heartsaver First Aid/CPR/AED	6		
Heavy Equipment Operations - Level 1	22	Heavy Equipment Operations - Level 1	24
		Heavy Equipment Operations - Level 2	5
HVAC - Level 1	14	HVAC - Level 1	20
HVAC - Level 2	6	HVAC - Level 2	12
HVAC - Level 3	5	HVAC - Level 3	11
HVAC - Level 4	4	HVAC - Level 4	5
HVAC 608 Certification	10	HVAC 608 Certification	9
HVAC Tradesman License Renewal	16	HVAC Tradesman License Renewal	22
Instructor Training Class (ICTP)	8	Instructor Training Class (ICTP)	16

Manufacturing Specialist (MS)	5	Manufacturing Specialist (MS)	11
Manufacturing Technician 1 (MT1)	5	Manufacturing Technician (MT1)	11
		Medication Aid	1
		OSHA 10 Construction	15
OSHA 10 General Industry	27	OSHA 10 General Industry	20
OSHA 30 General Industry	9	OSHA 30 General Industry	4
Pharmacy Technician	4	Pharmacy Technician	4
Plumbing - Level 1	7	Plumbing - Level 1	6
Plumbing - Level 2	3	Plumbing - Level 2	10
Plumbing - Level 3	5	Plumbing - Level 3	4
		Plumbing - Level 4	8
Plumbing Tradesman License Renewal	29	Plumbing Tradesman License Renewal	37
Shielded Metal Arc Welding (SMAW)	22	Shielded Metal Arc Welding (SMAW)	15
SHRM Certified Professional	4	SHRM Certified Professional	3
		SHRM Senior Certified Professional	1
Word 2013 (MOS)	2		
Grand Total	751	Grand Total	803

Appendix 2 – Quarterly Project Status Report

GO Virginia Region 8 Project Status Report (As of July 2019)

	Name of Project	Project Description	GO VA Funds	Contract Date	Participating Localities	Project Status as of July 2019
1.	Rockbridge Area Advanced Manufacturing Program (RAAMP)	This project addresses the demand for welders throughout the Shenandoah Valley by increasing enrollment and student access to training opportunities in welding. Byers Technical Institute (BTI) is a branch of Byers Inc., which opened the new technical training center in Glasgow (Rockbridge County) in August 2017, in order to address the high demand for skilled welders at Byers as well as several of their local industry partners. GO Virginia funds will be used to purchase additional training equipment and to hire and train new instructors, which will facilitate the introduction of additional course offerings, including nights and weekends. 72 welders expected to graduate over a 5-year period. Average annual wage is \$42,500.	\$100,000	April 2018	Rockbridge County, Buena Vista	BTI has hired instructors, purchased equipment and machinery, made building modifications, installed an underground high-speed telecommunications line, and upgraded the facility's electrical system. As of April 30, 12 students in the combination program have received a combined total of 47 credentials/certifications, and 20 students enrolled in the accelerated program gained a combined total of 39 credentials/certifications. Of program completers, 100% have become employed as welders. Eleven students have been employed by six different companies.
2.	BRCC Cyber Security Workforce Training Program	This project will implement a new cyber security workforce development program through Blue Ridge Community College with a non-credit training course. The project will produce new industry credentials (CompTIA Security+) that are not currently offered in	\$200,000	August 2018	Harrisonburg, Waynesboro	The first cohort of 12 student completed their classroom training in February 2019 and will continue their studies with the Cybrary online training platform. These students are receiving additional training by assisting with basic cyber risk assessments

	Name of Project	Project Description	GO VA Funds	Contract Date	Participating Localities	Project Status as of July 2019
		the region. GO Virginia funds will be used for program administration for project manager and instructor salaries. 50 students will be trained over two years and placed in jobs with an average an average salary of \$53,641.				for businesses in the Shenandoah Valley. The second cohort of 12 students began classes in March. Upon completion of classroom training, students may work in the GreySurf, LLC office that opened in the new BRCC Outpost in Waynesboro. BRCC has received over 140 applications for this program.
3.	Staunton Innovation League –Tech-Lab Feasibility Study	The Staunton Innovation League will assess the feasibility of creating the Tech-Lab, a student-entrepreneur makerspace, to teach creative and collaborative ways to use innovative equipment and technology such as 3D printers, laser cutters, robotics, and electronics. This study will 1) assess the need for this initiative 2) determine the equipment and relevant curriculum for the initiative, 3) assess the practicality of bricks-and-mortar and mobile lab spaces, and 4) identify funding sources to support build out of the Tech-Lab. GO Virginia funds will be used to procure a consultant to complete the study and to cover the cost of meetings and events related to completing this work.	\$23,000 (Enhanced Capacity Building Grant)	December 2018	Staunton, Page County	A consultant, Matthew Shields of Shields Lab, LLC was hired in January 2019. Data, reports and regional economic development strategic plans were analyzed, and the steps to develop and launch the HubLab and Mobile HubLab were identified. Career and technical education curriculum offerings for 15 area high schools or school systems have been reviewed. A stakeholder meeting involving 12 different organizations was held to develop a vision for future curriculum development, as well as identify the steps needed and opportunities to provide in the HubLab. A series of surveys and questionnaires have been created, and additional stakeholder interviews are underway. A Board of Directors is being assembled to assist in targeting revenue streams and assist with fundraising.

	Name of Project	Project Description	GO VA Funds	Contract Date	Participating Localities	Project Status as of July 2019
4.	Shenandoah Valley Talent Solutions Strategy	This project will develop a Talent Solutions Strategy to address: 1) high school and college graduate retention 2) development of a workforce to meet the needs of regional businesses, and 3) attraction of new workforce participation from outside of the Region and State. GO Virginia funds will be used develop the strategy through focus groups, interviews, surveys, and data analysis.	\$64,800 (Enhanced Capacity Building Grant)	December 2018	Counties of Clarke, Frederick, Page, Shenandoah, and Warren; and Winchester	An RFP for a consultant was released and a consultant selected. The project team has executed a contract with Development Counselors International (DCI) to complete this project. The project will kick-off in July with the first work sessions used to develop survey and interview questions. The research will focus on business HR managers and graduates of regional higher ed.
5.	Emil & Grace Shihadeh Innovation Center	The project will renovate the former John Kerr Elementary School in Winchester into an advanced 50,000 sf facility for career and technical education programs. The Center will house three academies: Professional Skills, Health Sciences, and Information Technology including a Cyber Security Lab. The project will outfit the facility with equipment necessary for welding, robotics, print, CAD and cyber laboratories. The three academies will be supported by Winchester's Public School's expanded Work-Based Learning program that will connect students to regional businesses filling high-wage jobs in the targeted clusters. The first academy is expected to open in January 2020.	\$540,000	April 2019	City of Winchester, Clarke County	The Innovation Center will break ground in September 2019. The construction manager has been selected, and the instructional team continues to develop.
TOTAL			\$927,800			

Appendix 3 – Project Abstract Form

GO Virginia Region 8 Abstract of Proposed Project

Please provide the following information to outline your proposed GO Virginia project (and limit to 2 pages or less).

Brief description of project:

Related GO Virginia framework(s): (circle one or more, if applicable)

- 1) Talent Pipeline/Workforce
- 2) Start-ups & Entrepreneurial Ecosystem
- 3) Site Development
- 4) Business Scale-up

Partnering organizations:

Estimated Grant Request from GO Virginia: \$ _____

Level of preliminary work completed (e.g. early discussion, initial planning, advanced planning, almost ready to go):

Availability of matching funds (e.g. commitments, % of non-state funds):

Estimated timeline for execution/implementation (assuming project approved by State Board): (circle one)

- | | |
|---------------------------------|--------------------------------|
| Q1 FY20 (July-Sept 2019) | Q3 FY20 (Jan-Mar 2020) |
| Q2 FY20 (Oct-Dec 2019) | Q4 FY20 (Apr-June 2020) |

Opportunities for collaboration inside/outside Region 8 (e.g. Reg 8 only; outside Reg 8 – actively being pursued/discussed):

How would the proposed project benefit the region and the Commonwealth? (e.g. ROI doesn't have to be quantified at this time, just explain benefits in broad terms):

Please provide the following:

Project Contact Name:

Organization:

Contact Email:

Contact Phone: