



Memphis Area CEDS

Comprehensive Economic Development Strategy

Presentation: June 21, 2017

Randall Gross / Development Economics for
Memphis Area Association of Governments
(MAAG)

Purpose & Components

- ***Strategic Plan for regional economic development, coordination, and cooperation.***
 - *Regional Economic Base Analysis*
 - *Target Industrial Review & Assessment*
 - *Labor Force Education & Skills Review*
 - *Existing Economic Development Resources*
 - *Strategic Direction: Vision, Goals, Objectives*
 - *Strategic Recommendations*
 - *Implementation Action Plan & Evaluation Framework*

Key Inputs

- Stakeholder Engagement Process
 - Steering Committee
 - Focus Groups
 - Interviews
 - Survey
- Document Review
 - Existing LED & other pertinent plans, strategies, policies, communications
- Data Analysis
 - Competitive advantages, employment & labor force, business establishment, commutation, location quotients, inventories, real estate market review, etc.



Economic Base Assessment

Location and Assets

- **Transportation Access**

- **Water:**
 - 5th biggest inland port
- **Rail:**
 - One of only 3 cities with 3 Class I railroads; major intermodal facilities
- **Air:**
 - Busiest cargo hub in US, 2nd in world
- **Road:**
 - 5 branches of interstate system; trucking hub

- **Business Nodes**

- 40+ large office and industrial parks
- Downtown Memphis
- Midtown/Medical District
- Poplar Corridor
- 385 Corridor
- Wolfchase
- Winchester Road Corridor
- Downtown Collierville
- Arlington Depot Square
- Other nodes and corridors
 - *Some, like Ripley, suffer high vacancy, economic distress*

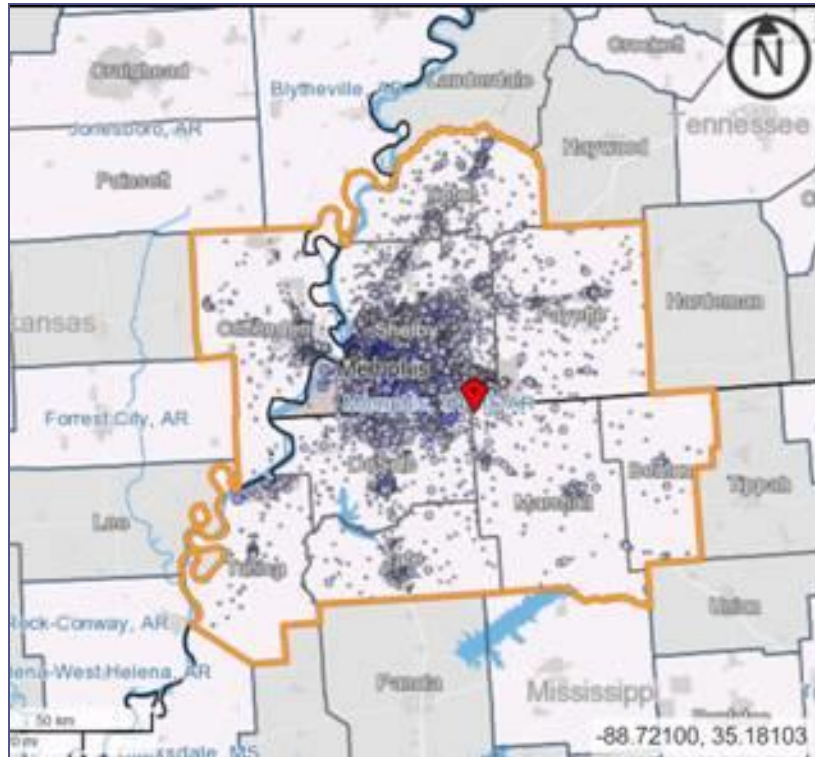
Institutions & Assets

- Major health care & medical research facilities
 - St. Jude Children's Research Hospital
- 20 colleges and universities
 - 37,400 enrollment
- Cultural heritage & institutions
 - Beale Street / Blues Music
 - Graceland / Elvis
 - National Civil Rights Museum
 - Stax Museum of Soul Music
 - Overton Square Theatre District
 - Brooks Museum of Art
 - Memphis BBQ
 - Chucalissa Village, etc.
- Natural features & assets
 - Mississippi River
 - TO Fuller State Park
 - Mud Island
 - Shelby Farms
 - Overton Park/Memphis Zoo/Botanical Gardens
 - Chickasaw NWR
 - Many parks, reserves, etc.

Major Businesses

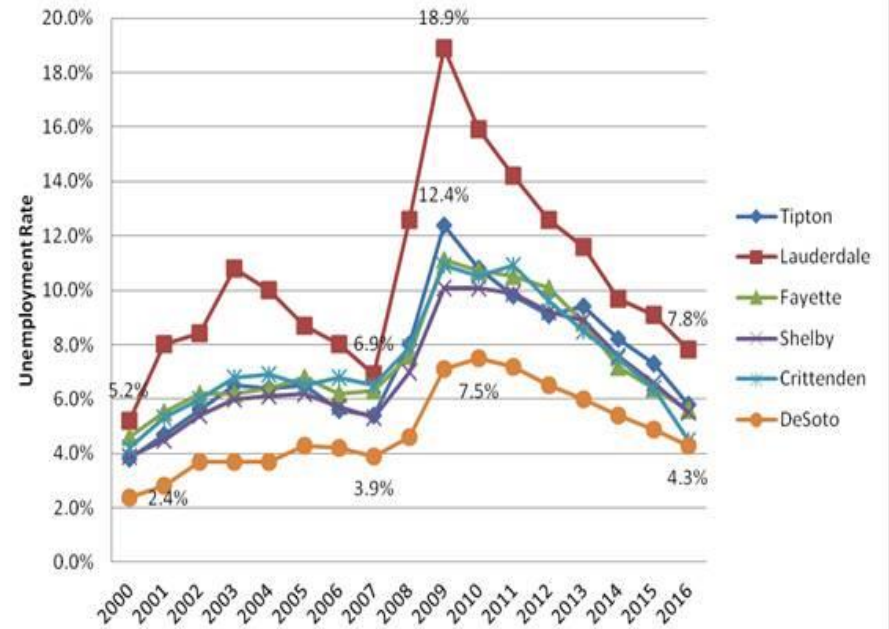
1.	FedEx Corporation	HQ	Memphis	Freight	32,000
2.	Methodist Healthcare	NP	Memphis	Hospitals	10,890
3.	Baptist Memorial	NP	Memphis	Hospital	8,000
4.	Wal-Mart Stores	P	Regional	GM Retailer	6,500
5.	St. Jude Rsch. Hospital	NP	Memphis	Hospital	3,700
6.	Kroger Delta Marketing	DIV	Memphis	Groceries	3,500
7.	First Horizon Natl. Corp.	HQ	Memphis	Bank HC	3,290
8.	University of Memphis	ED	Memphis	University	2,800
9.	Memphis LG&P	UTIL	Memphis	Utility	2,630
10.	Century Management	P	Memphis	Restaurants	2,500
11.	United Parcel Service	P	Regional	Freight Dist.	2,500
12.	AutoZone Incorporated	HQ	Memphis	AS Retailer	2,300
13.	Swift Transportation	P	Memphis	Trucking	2,100
14.	International Paper	HQ	Memphis	Paper Prod	2,000
15.	Regional Medical Center	G	Memphis	Hospital	2,000
16.	St. Francis Hospital	NP	Memphis	Hospital	2,000
17.	UT Medical Group	P	Memphis	Physicians	2,000
18.	VA Medical Center	G	Memphis	Hospital	2,000
19.	Valenti Mid-South Mgt.	P	Memphis	Restaurants	1,800
20.	Williams Sonoma	DIV	Olive Br.	Distribution	1,800

Labor Force & Employment



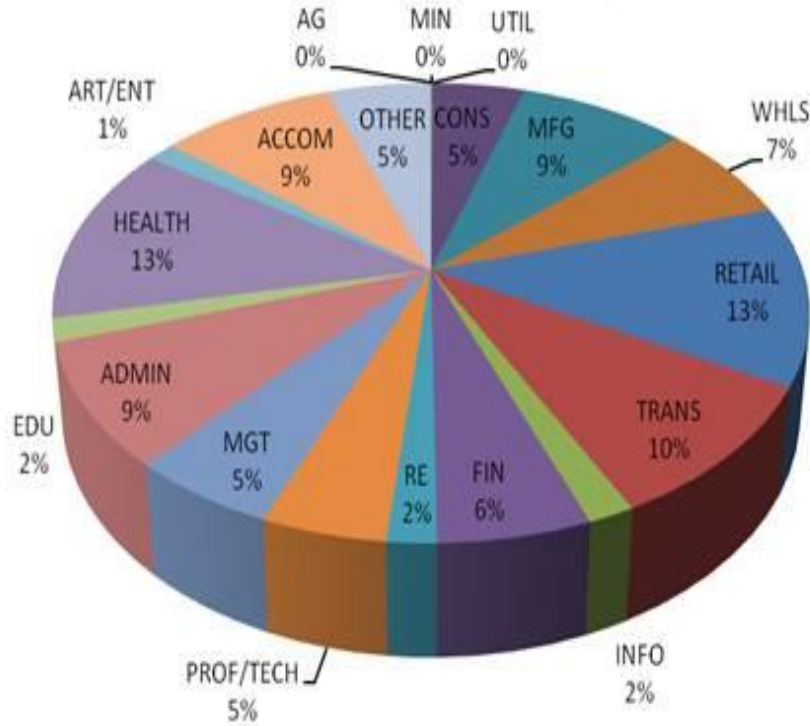
MAAG Region Unemployment Rates, 2000-2016

Sources: U.S. BLS, MDES, TNDOLWD, ARDOL, and Randall Gross / Development Economics



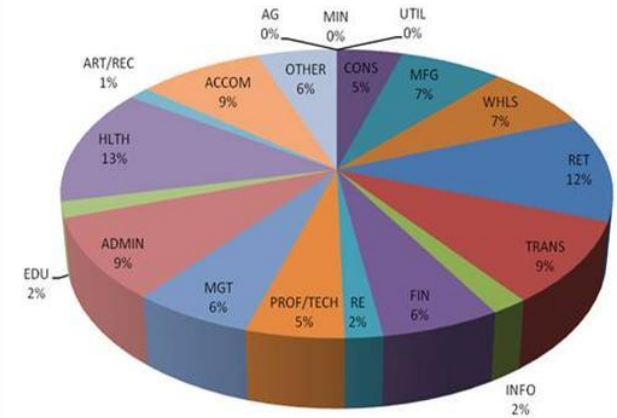
MAAG Region Economic Base (2014)

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics



Shelby County Economic Base (2014)

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics



Tipton County Economic Base (2014)

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics

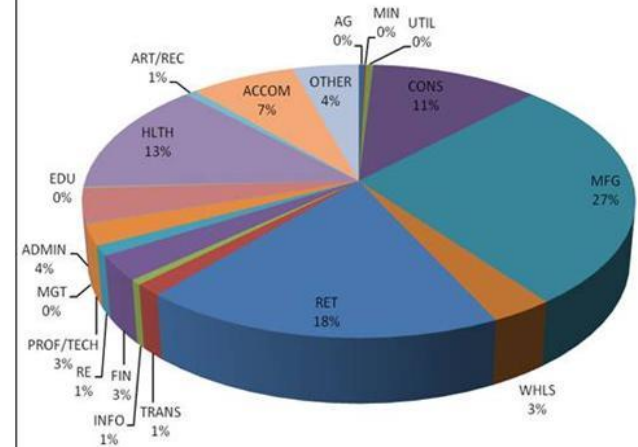


Table 4. AT-PLACE EMPLOYMENT TRENDS BY MAJOR INDUSTRY SECTOR, MAAG REGION, 2005-2014

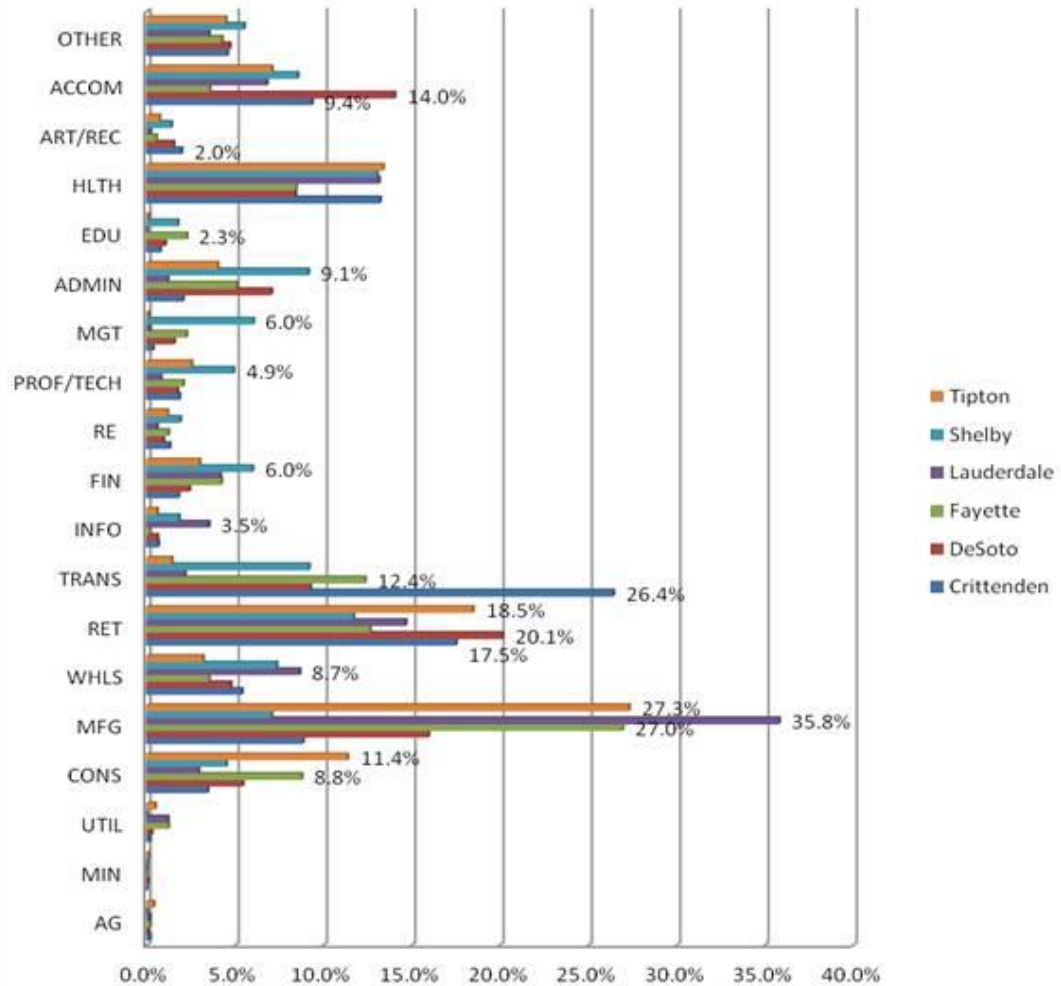
Sector	2005	2010	2014	2005-2014 Change	
				Number	Percent
Agriculture	382	332	124	(258)	-67.5%
Mining	83	93	85	3	3.0%
Utilities	384	322	318	(66)	-17.2%
Construction	18,505	19,160	24,011	5,507	29.8%
Manufacturing	36,490	35,123	43,904	7,414	20.3%
Wholesale Trade	34,001	36,208	35,946	1,946	5.7%
Retail Trade	62,228	57,356	64,742	2,514	4.0%
Transport	56,295	53,786	48,995	(7,300)	-13.0%
Information	6,501	6,778	8,623	2,122	32.6%
Finance & Insurance	17,757	20,531	28,329	10,573	59.5%
Real Estate	7,792	7,016	9,125	1,333	17.1%
Prof/Tech Services	18,159	18,673	23,061	4,902	27.0%
Management Svcs	25,792	29,300	27,416	1,624	6.3%
Administrative Svcs	52,966	46,815	43,986	(8,981)	-17.0%
Education	12,064	10,155	8,413	(3,651)	-30.3%
Health	78,834	74,268	65,063	(13,771)	-17.5%
Arts, Entertain, Rec	6,794	6,367	7,150	356	5.2%
Accommodation/FS	49,345	45,602	45,451	(3,894)	-7.9%
Other Services	23,278	24,258	27,566	4,288	18.4%
NEC	63	74	142	79	124.6%
TOTAL	507,711	492,213	512,438	4,727	0.9%
Note:	Some data estimated based on Census ranges.				
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Table 5. GROWING AND DECLINING SECTORS BY COUNTY, MAAG REGION, 2005-2014

County	Growth Sector		Declining Sector	
	Sector	Rate	Sector	Rate
Crittenden	Transport	122.0%	Adm in Svcs	-58.4%
DeSoto	Mgt Svcs	460.3%	Adm in Svcs	-52.4%
Fayette	Transport	346.7%	Acc om/FS	-73.8%
Lauderdale	Mfg	73.8%	Wholesale	-45.1%
Shelby	Finance	66.2%	Education	-30.5%
Tipton	Mfg	32.3%	Acc om/FS	-35.6%
MAAG	Finance	59.5%	Education	-30.3%
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			

MAAG Region Employment by County & Sector, 2014

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics



Accommodation: DeSoto

Health Care: 6 counties

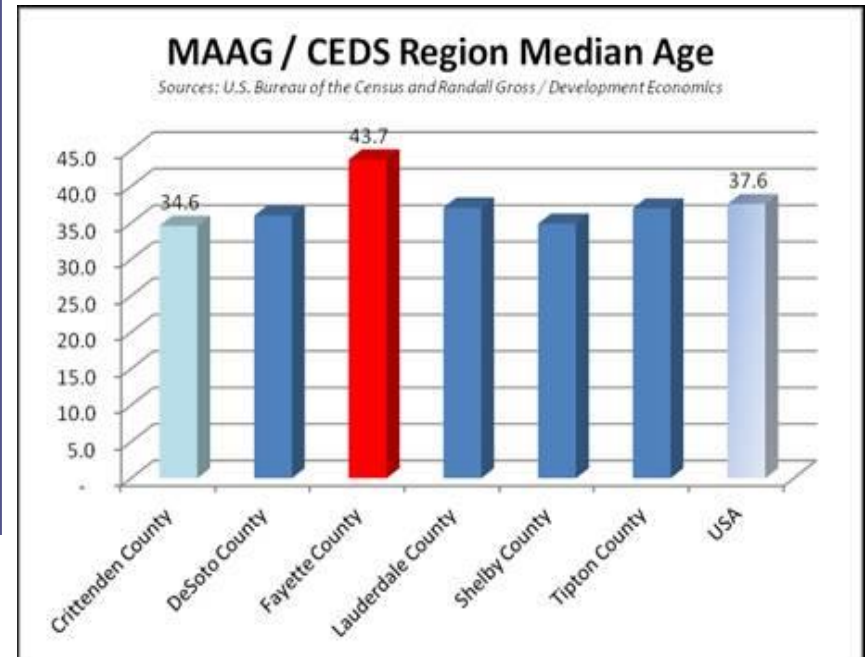
Prof/Tech, Mgt, Admin
& Financial Services:
Shelby

Transportation:
Crittenden

Manufacturing:
Lauderdale, Tipton,
Fayette

Demographic Trends

Table 1. POPULATION TRENDS, MAAG REGION, 2010-2015				
Area/Factor	2010	2015	2010-2015 Change Number	Percent
Crittenden County	50,673	49,765	(908)	-1.8%
DeSoto County	154,715	168,586	13,871	9.0%
Fayette County	37,458	38,814	1,356	3.6%
Lauderdale County	27,745	27,427	(318)	-1.1%
Shelby County	922,696	937,750	15,054	1.6%
Tipton County	59,689	61,674	1,985	3.3%
TOTAL	1,252,976	1,284,016	31,040	2.5%
<i>CEDS Region</i>	<i>1,047,588</i>	<i>1,065,665</i>	<i>18,077</i>	<i>1.7%</i>
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			



Income and Wages

Table 6. AVERAGE WEEKLY WAGE, MAAG REGION, 1/2016				
County	Average Weekly Wage	Rank	Annual Change	Total Wage Income
Crittenden 1/	\$ 738.00	3	11.1%	\$ 12,805,038
De Soto 2/	\$ 637.00	6	0.5%	\$ 36,018,528
Fayette	\$ 781.00	2	5.1%	\$ 6,082,428
Lauderdale	\$ 642.00	5	3.2%	\$ 3,838,518
Shelby	\$ 991.00	1	-1.8%	\$ 482,765,650
Tipton	\$ 659.00	4	5.8%	\$ 7,229,230
Weighted Av/Total	\$ 936.76		-1.1%	\$ 548,739,392
<i>vs US Average</i>	<i>\$ 843.00</i>		<i>2.8%</i>	
Notes:	1/ 4th Quarter 2015; 2/ 2nd Quarter 2016.			
Sources:	U.S. Bureau of Labor Statistics and Randall Gross / Development Economics.			

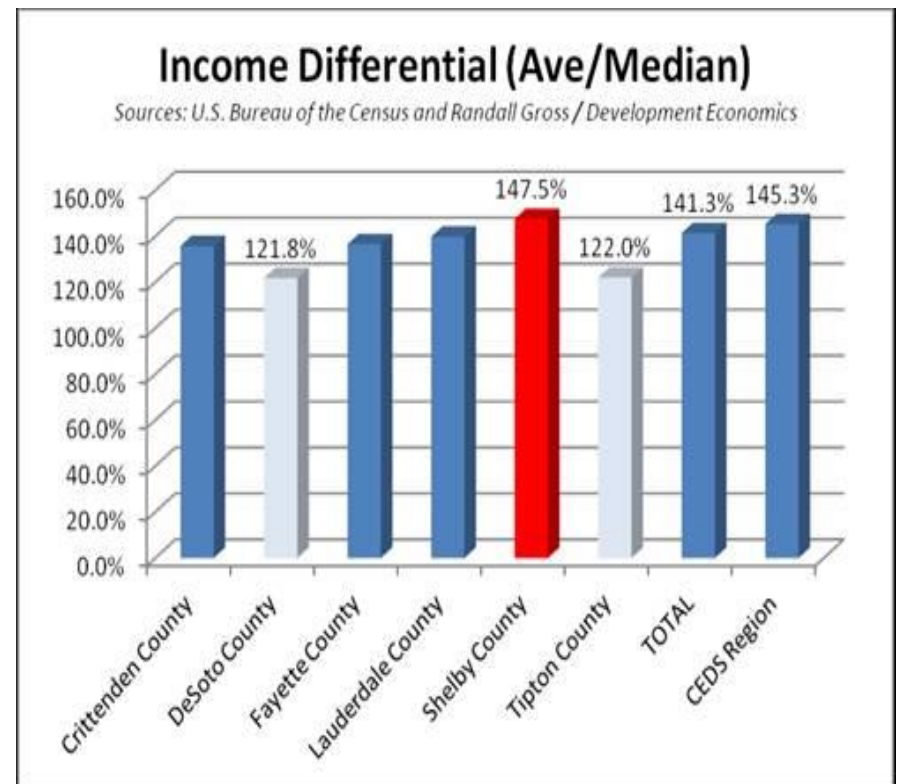
Table 7.

**MEDIAN HOUSEHOLD INCOME TRENDS,
MAAG REGION, 2010-2015**

Area/Factor	2010	2015	2010-2015 Change	
			Number	Percent
Crittenden County	\$ 36,373	\$ 38,004	\$ 1,631	4.5%
DeSoto County	\$ 64,100	\$ 58,278	\$ (5,822)	-9.1%
Fayette County	\$ 61,199	\$ 54,890	\$ (6,309)	-10.3%
Lauderdale County	\$ 35,486	\$ 30,281	\$ (5,205)	-14.7%
Shelby County	\$ 48,228	\$ 46,224	\$ (2,004)	-4.2%
Tipton County	\$ 53,269	\$ 53,669	\$ 400	0.8%
TOTAL	\$ 50,028	\$ 47,719	\$ (2,308)	-4.6%
<i>CEDS Region</i>	\$ 48,651	\$ 46,562	\$ (2,089)	-4.3%
Note:	Incomes expressed in constant 2015 dollars.			
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.			

Poverty & Income Inequality

- Memphis ranked
 - **9th in poverty** level (among 102 largest markets)
 - **5th in concentration of poverty** (among all metros), behind McAllen, Fresno, Bakersfield – migrant worker communities)
 - Being comparable to Jackson, Toledo, or Modesto does not really help the Memphis **region's brand**. The region's status presents challenges for image enhancement, business recruitment, entrepreneurship, labor force development, and other factors impacting on overall economic development

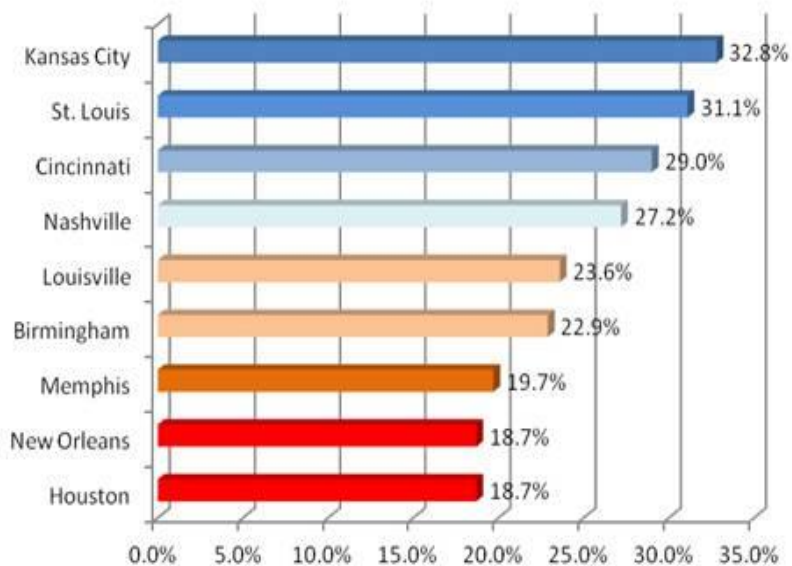


Workforce Skills & Training Assessment

Education & Occupations

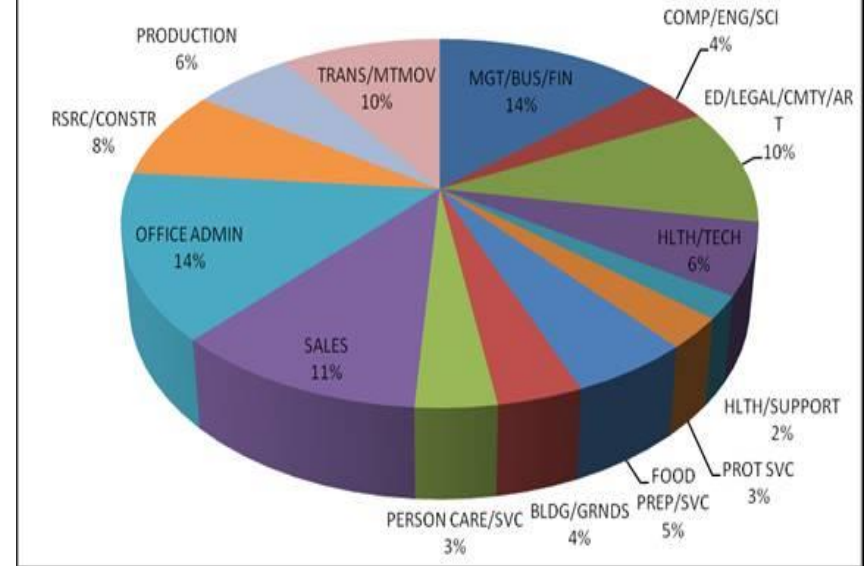
Education Differential Metro Comparison, 2015

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics



Occupations, MAAG Region, 2015

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics



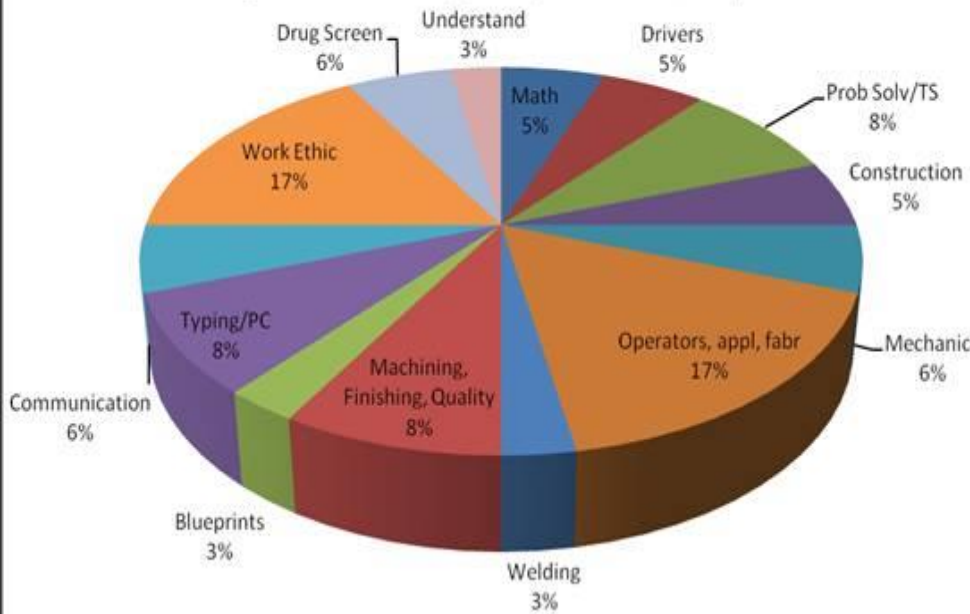
Labor Force Challenges & Opportunities

- **Skills among those not working (GMACW)**
 - Office and administrative support (9.7%),
 - Computer/IS-support (9.7%),
 - Warehouse & distribution (6.8%),
 - Transportation & material moving (5.8%),
 - Construction (4.9%),
 - Healthcare/tech (4.9%),
 - Special trades (4.9%),
 - Personal services (3.9%),
 - Installation & repair (3.9%),
 - Information/media services (3.9%).
- **Key challenges and deficiencies**
 - Education-to-jobs mis-match
 - Disability / health issues
 - 20% of those not seeking work due to disability
 - Lack of transport to work
 - Training financial gap
 - Recruitment challenges
- **Skills in Demand**
 - Customer Service Reps
 - Information Tech
 - Machinists
 - Packers & Packagers
 - Dental lab techs
 - Medical appliance techs
 - Electromechanical equip. assem.
 - Insurance underwriters
 - Electrical equipment assemblers...

Skills Gap

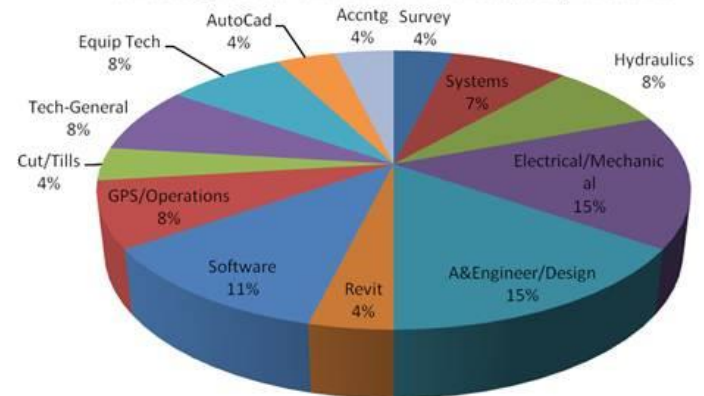
"Basic" Skill Gaps

Sources: Younger Associates - GMACW Employer Survey and Randall Gross / Development Economics



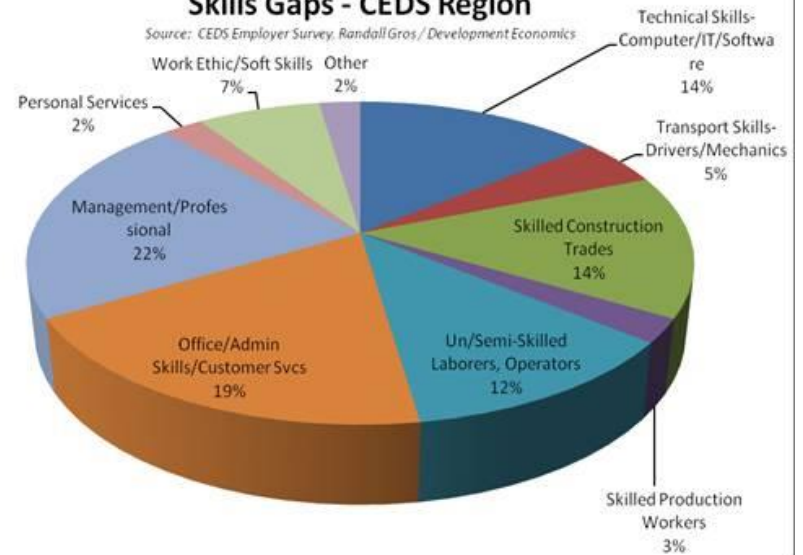
"Tech" Skill Gaps - Memphis Region

Sources: Younger Associates - GMACW Survey, and Randall Gross / Development Economics



Skills Gaps - CEDS Region

Source: CEDS Employer Survey, RandallGros / Development Economics





Development Policy & Program Assessment

ED-Related Organizations

- Memphis EDGE
- Memphis-Shelby County IDB
- Fayette County & 8 other IDBs
- Downtown Memphis Comm.
- MAAG
- Greater Memphis Chamber
- Mid-South Minority BC
- West TN Industrial Assn
- Lauderdale Chamber/ECD
- HTL Advantage (Haywood, Tipton, Lauderdale)
- Memphis CVB & other CVBs
- Covington-Tipton Chamber
- Delta Regional Authority
- Other chambers of commerce
- Aero City Alliance (Whitehaven EDC)
- Greater Memphis Alliance for a Competitive Workforce
- Memphis Tomorrow
- New Memphis Institute and IMPACT Memphis
- Emerge Memphis
- EPI Center, StartCo, and other accelerators
- Greater Memphis Medical Devices Council, AgriCenter International, National Cotton Council, Memphis IT Council, and other industry groups
- Memphis Light, Gas & Water
- Leadership Memphis
- West Memphis Chamber
- Fayette County Chamber
- North MS Alliance
- CEOs for Cities
- Hyde Family Foundations
- Advance Memphis
- Other local ED departments
- Memphis Research Consortium
- Diversity Memphis, etc.

Target Industry Analysis

Existing Targets

- **Summary**
 - Transport & Logistics Cluster
 - Manufacturing
 - Agribusiness
 - Electronics
 - Medical Equipment
 - Automotive Parts & Equip
 - “Green” Industry
 - Advanced Manufacturing
 - Medical
 - Health Care,
 - Bioscience/Life Science
 - Med-tech
 - Management Services
 - Tourism
- Memphis-Shelby
 - Logistics, manufacturing, health/bioscience, corp offices, export businesses
- Bartlett/NE Shelby
 - Green, agribusiness, life sciences, retail/hospitality
- Tipton/Lauderdale
 - Logistics, auto parts manufacturing, solar energy products, food processing
- West Memphis
 - Logistics, biosciences, manufacturing, green
- DeSoto County
 - Warehouse & distribution, tourism

Location Quotients (Industry Concentrations)

Manufacturing

- Household appliances and, in particular, household cooking appliances (335221), with a total LQ of 15.32.
- Grain and oilseed milling (NAICS 3112), which includes rice milling (311212) and breakfast cereals (31123), but with especially high concentrations in starch and vegetable fats & oils (NAICS 31122, LQ 14.07) – wet corn milling, soybean, fats, & oils refining, blending
- Ice cream and frozen desserts (NAICS 31152, LQ 12.92), e.g., Blue Bell
- Pesticides & other agricultural chemicals (NAICS 32532, LQ 12.17)
- Plumbing fixtures & trim (NAICS 332913, LQ 10.29)
- Surgical appliances & supplies (NAICS 339113, LQ 10.04). Relating to this concentration is a strong focus in manufacture of ophthalmic goods.

Transport

- Mixed-mode transportation systems (NAICS 485111), with an overall LQ of 132.50,
- Couriers & express delivery services (NAICS 4921), with an LQ of 28.92

Other Sectors

- Farm product material wholesale trade (NAICS 42459, LQ 10.07)
- Farm product warehouse & storage (NAICS 49313, LQ 11.49)
- Other warehouse & storage (NAICS 49319, LQ 10.45)
- Repossession services (NAICS 561491, LQ 10.26)

Existing Clusters & Refined Targets

Existing Clusters

- Transport & Logistics
- Packaging
 - Wood containers, pallets
 - Corrugated boxes
 - Adhesives
 - Laminate plastics & sheet
 - Plastic bottles, etc
- Bulk Goods
 - Farm commodities & products
 - Chemicals, other
- Air Freight Products
 - Perishables
 - High-value freight (e.g., medical equipment)
- Health Care/R&D/Medical

• Competitive Advantages

- Location & transport access
- Affordability
- Available labor force
- Culture & identity

• Refined Targets

- Administrative Support Services
 - Back-office business services
- Manufacturing
 - Air-freight products (perishables, high-value goods)
 - Food & Agricultural Products
 - Electrical Equipment
 - Packaging
- Med/Bioscience R&D
 - Pharma/Botanicals
 - R&D anchors, emerging tech/app
 - Dental laboratories
- Rural Tourism Corridors

Strategic Recommendations

Strategic Direction: Key Themes

- **Labor force issues** are holding back economic growth
- Memphis region suffers from **negative image**
- **Research base** not translating into business development
- Region lacks **mass transit**
- **Rural areas** are not sharing in economic prosperity
- Logistics cluster subject to **automation**
- Regional economic development **coordination**

Goals

- **Regional Economic Development.** Target resources to address shared concerns (e.g., regional transportation, marketing image, labor markets), define specialized niches that build on local competitive strengths, and ensure economic prosperity reaches all geographic sectors.
- **CEDS.** The Goal for this CEDS is to define those areas where value can be added to strengthen existing programs or create new mechanisms for meeting regional economic development goals and objectives.

Objectives

- **Targets.** Refine target industries for which the region has a competitive advantage but where there is a gap in regional marketing, business recruitment, and labor force development efforts
- **Competition.** Develop target niches for areas within the region to help reduce competition and build on competitive advantages
- **Value** (such as information), where possible, to the workforce development efforts already underway from various entities in the region.
- **Infrastructure.** Identify Infrastructure that could help support regional economic development and/or fill significant gaps in sub-regional development.
- **Collaboration.** Identify new opportunities for Coordination and Collaboration in economic development region-wide or on a sector or sub-regional basis.
- **Image.** Identify opportunities for enhancing regional Image or Identity.
- **MAAG.** Identify Roles for MAAG in the regional and sub-regional economic development strategies identified as part of this plan.

Marketing & Business Recruitment

- **Existing Targets**

- Transport & Logistics Cluster
- Manufacturing
 - “Tradable commodities”
 - Agribusiness
 - Electronics
 - Medical Equipment
 - Automotive Parts & Equip
 - “Green” Industry
 - Advanced Manufacturing
- Health Care, Bioscience, Life Science & Med-Tech
- Management Services
- Tourism

- **Regional Opportunities**

- Administrative Support Services
 - Back-office business services
- Manufacturing
 - Air-freight products (perishables, high-value goods)
 - Food & Agricultural Products
 - Electrical Equipment
 - Packaging
- Med/Bioscience R&D
 - Pharma/Botanicals
 - R&D anchors, emerging tech/app
 - Dental laboratories
- Rural Tourism Corridors

Local & Corridor Specialization

- **Airport/Aerotropolis**
 - High-value goods
 - Perishables
 - Packaging
- **Port Areas (M/WM)**
 - Manufacturing: bulk products
- **Midtown & Med District**
 - Medical/Bioscience
 - R&D
 - Medical instrument mfg.
- **SE/NW Axis**
 - Transport & logistics cluster
- **Rural counties and areas (Tipton, Lauderdale, Fayette)**
 - Tourism Corridors
 - Agribusiness
 - Packaging
 - Construction
 - Transport Equipment
 - Electrical/Med Equipment
 - Admin Support

Marketing Approaches

- **Packaging Cluster Collaborative**

- Packing & Crating Services
- Plastic Packaging & Sheet Manufacturing
- Packaging & Labeling Services
- Corrugated & Solid Paper Box Manufacturing
- Postal Services
- Wood Crate and Pallet Manufacturing
- Source Material Producers:
 - Paper, plastic, wood, wire, dye/pigments, resins & adhesives
- Transportation Services:
 - Courier and express delivery services; trucking services; rail transportation services; etc.

- **Rural Tourism Initiative**

- Stronger recognition and development of music and other heritage attractions
- New destination attractions that strengthen overall tourism marketing themes and tour itineraries.
- Extension of tour and transportation services through regional networks
- Destination recreation lodging, services and associated activities.
- Stronger coordination of regional event calendars and tour itineraries
- Heritage and other corridors in the region that tie disparate attractions together thematically through transportation and visitor experience enhancements, interpretation and signage programs, mobile applications, grant funding mechanisms, permanent collections, special exhibitions, events, and individual tour operations

- **Small Towns: Admin & Mgt Support Services Cluster**

- Financial planning, billing and recordkeeping
- Payroll and human resources
- Internal travel, logistics and distribution services
- Employment services
- Office cleaning services
- Document preparation services
- Call centers
- Business service centers
- Collections
- Customer sales and services
- Internal IT/maintenance services
- Web design and Internet services
- Technical support

- **West Tennessee Small Town Downtown Collaborative**

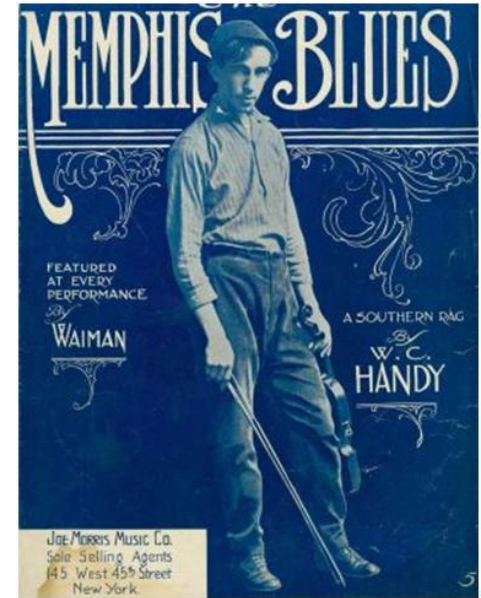
- Community heritage and historic preservation
- Aesthetics and sense of place
- Transportation enhancements
- Targeted business development and housing
- Higher education and similar anchor recruitment or development
- Heritage and recreation tourism
- Community pride and identity branding
- Information technology, related infrastructure and capacity
- Administrative Services workforce readiness & development
- Retirement housing and services



*RIPLEY
IS FAMOUS
FOR ITS
TOMATOES.*

- **Agribusiness Product Development Initiative**
 - Wood & Paper Products, Windows/Doors, Pallets, Pre-Fab Building
 - Wholesale of Agricultural Products
 - Wholesale of Farm Equipment & Machinery
 - Petroleum Bulk Wholesalers
 - Farm Machinery & Equipment
 - Support Activities or Animal Production
 - Farm Product Warehousing & Distribution
 - Surveying & Mapping
 - Food Production: Sugar Confectionary, Dairy Products, Ice Cream, Frozen Specialty Food Manufacturing, Specialty Meats, etc.

- **Consistent Globally-Recognized Brand**
 - Music theme: Birthplace of American Music
 - International appeal
 - Successful tourism marketing distilled for economic development
 - Business recruitment
 - Labor force recruitment & development
 - Millennials
 - Creative Class
 - Sense of place
 - Programmatic
 - International business
 - Product development and branding
 - Regional brand application not limited to city of Memphis
 - Provides positive images of city, region



Workforce Development

- **Gaps**

- Dearth of direct, local technical assistance for training and workforce development, especially in small and emerging businesses.

- Disconnect between targeted industries and workforce development programs



- Greater Memphis Alliance for a Competitive Workforce (GMACW)
 - Collaboration with Lauderdale & Rural Counties
 - Targeted industry development services (*2016 Strategic Sector Workforce Analysis*)
 - Customer Service Reps
 - Skilled Entry IT Specialists
 - Machinists
 - Labor Market Analysis
 - Administrative & business support services
 - Packaging
 - Agribusiness

Incentives & Leveraging

- **Existing Tools & Incentives**

- TIF (State-enabled)
- PILOT (State-enabled)
- TN FastTrack Program
- TN Tax Credits
- TN Sales & Use Tax Exemptions
- Launch Tennessee, TN BERO, TNMEP, SBDC, SBOTN, etc.
- TN Workforce Dev. Support
- WIN, Rideshare, GMACW, QPC

- **Potential Tools & Incentives**

- Local grant programs
- Local Special Assessments
- Small Business Incentives
 - Cash-for-jobs
 - Grant-for-construction
 - Growth grants
 - Micro-lending
- Uses: building rehabilitation, transport, day care, machinery & equipment, job-related cash grants, façade improvement grants, etc.
- Role for MAAG in exploring incentive programs
- Potential “Soft” Incentives (Networking, Technical Assistance)
- Infrastructure, Fast Track

Placemaking & Infrastructure

- **Small town downtowns**
(Role for MAAG)
 - Physical environment
 - Management
 - Retail & tourism offering
 - Community identity & sense of place
- **Broadband capacity expansion**
 - Rural counties
- **Regional Transport Infrastructure**
 - Integrate future target industry growth
 - Integrate disparate geographic areas (Fayette, Tipton, Lauderdale, AR-MS)
 - Role for MAAG
 - Direct investment
 - Lauderdale: improved east-west highway access
 - Regional public mass transit
 - Streetscape & Corridor revitalization

Regional Collaboration

- **Small Downtowns Technical Support Program (MAAG)**
 - Downtown master planning
 - Downtown market analysis and economic development strategies
 - Regional tourism development and heritage corridor strategies
 - Downtown infrastructure planning and development
 - Workforce development in targeted small town downtown industries
 - Targeted financial, fiscal, regulatory, and economic incentives
 - Education on the role of downtowns in rural economic development, etc.
 - Co-marketing and cost-saving collaborations between small downtowns in the region
- **Regional Tourism Development Partnerships**
 - Strengthen linkages, develop physical assets, and bring more resources to rural areas
 - Tourism development strategies
 - Development of heritage corridors
 - Resources for corridor revitalization and physical enhancements.
 - Partnerships between Memphis-area attractions, venues, and events with those in the surrounding region
 - Partnerships between the various tourism marketing entities in the area for marketing joint resources

Implementation & Evaluation

- **Collaboration & Partnerships**

- Administrative & Business Support Services Cluster Organization
- Packaging Cluster Organization
- Agribusiness Development Entity
- Corridor Development Partnerships

- **Implementation Action Plan**

- Facilitation, partnership development, and technical assistance role for MAAG
- Program focus on smaller communities and rural areas
- Regional labor force focus
- Regional infrastructure focus

- **Evaluation Framework**

- Facilitation & Collaboration
- Technical Support
- Funding & Grant Assistance
- Communications

Discussion