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OUR THANKS!

In researching and preparing this plan, Hayes Group Consulting thanks the Partners In Progress Board and the broad cross-section of community leaders for their accessibility and willingness to contribute to this work.

Notably, there are partners who provided the funding in order for this plan to be developed. These organization deserve the thanks of the entire community: The Palmer Foundation, Duke Energy, Randolph Electric Membership Corporation, Pee Dee Electric Membership Corporation, and Central Electric Membership Corporation.

Our special thanks goes to the Partners In Progress office: Pat Corso, President, and Melanie Thompson, Office Manager. Their efforts have been tireless in helping to bring people together for extensive interviews and focus groups – and in helping move the planning process forward.

In Moore County, there is a diversity of landscape – rural, micropolitan, and resort. To us, what binds the community together is a sense of passion for this place, and a desire for the whole community to move forward together. We’ve tried to reflect those perspectives in this plan.



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1. EXECUTIVE SUMMARY

Hayes Group Consulting is pleased to submit this plan to the Partners In Progress Board. It is understood that the Board will want to fully review the plan, potentially make changes, and then formally adopt a plan to guide the work.

Most importantly, this plan (its Vision, Mission, Goals, Strategies, and Actions) is intended to be a “living document.” To accomplish this, implementation of the plan will require resources and continuous work.

The planning process began in January 2017. Hayes Group Consulting had ongoing and close interaction with the Partners In Progress Economic Development Office (Pat Corso, Melanie Thompson). Project updates were provided to the Partners Board at monthly meetings. A formal mid-term project presentation was given on May 9, 2017, with final plan presentation on December 5, 2017.

Compared to other plans, what is noteworthy to us as consultants is the degree of intensity that was given to the *Discovery Phase* of this project. Countywide strategic interviews were conducted that engaged 68 community leaders, business leaders, and elected officials. Further, we facilitated a series of focus groups that addressed the identified strategic drivers: Health/Medical Businesses, Manufacturing, Defense/Military, Agri-Business, and rural Moore County. Design of the strategic interviews and focus groups was greatly informed by research and was highly customized.

Issues For Planning

The decision to move forward and create a strategic plan at this time was driven by the issues Moore County is experiencing, and the macro changes underway that impact economic development. Leaders knew that Moore County was at a crossroads; they determined that the County needed to be proactive in addressing these longstanding trends, issues, and opportunities:

LEADERSHIP & GOVERNANCE: <ul style="list-style-type: none">▪ Lack of Economic Development Work Plan▪ Lack of consensus on direction▪ Leadership Succession	TAX BASE: <ul style="list-style-type: none">▪ Only 6% employment from Manufacturing▪ Burden on infrastructure▪ Demographics shifting to less wealthy
POLITICAL: <ul style="list-style-type: none">▪ Moore is two counties (Northern & Southern)▪ Towns with different opinions▪ Tier 3 status	OTHER CHALLENGES/OPPORTUNITIES: <ul style="list-style-type: none">▪ Northern Moore needs defined possibilities▪ Southern Moore has issues of growth while sustaining character▪ Influx of Military population▪ Future of Golf/Resort▪ Growth of retail/micropolitan hub

The Charge

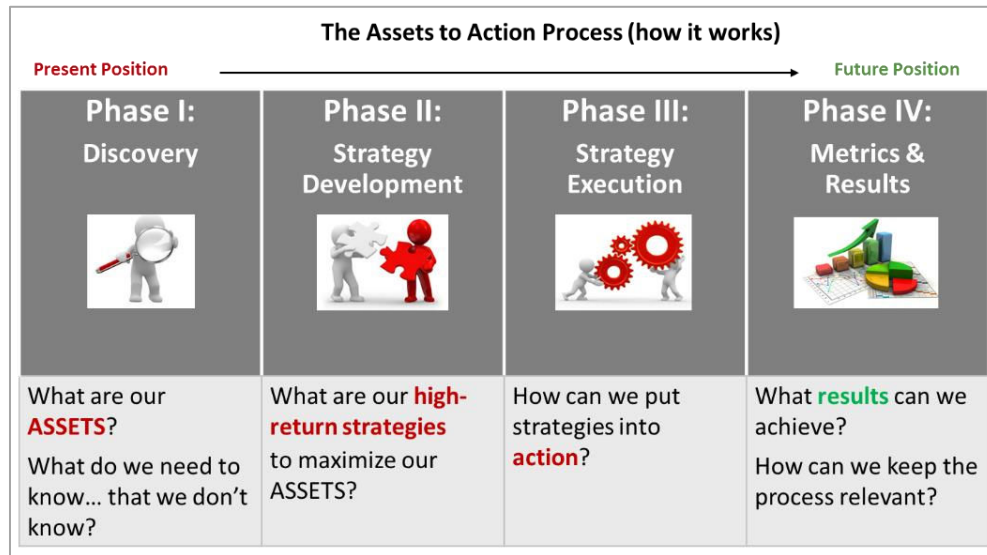
In order for the Plan to be relevant to the needs of Moore County, the following charge was given to Hayes Group Consulting by the Partners In Progress Board:

- Gain consensus on economic development direction across the County.
- Address the economic differences between the northern and southern parts of the County.
- Identify solutions for specific issues that are barriers to economic growth and development.
- Optimize distinctive Moore County assets.
- Explore ways to diversify and grow the tax base.
- Develop a work plan with relevant metrics to drive economic development.

Assets To Action Process™

Development of this plan followed a proven due-diligence process. The process, however, was carefully customized and coordinated with Partners In Progress to be responsive to all stakeholders, and to demonstrate that Moore County economic development is moving forward in ways to serve the whole county.

Hayes Group Consulting applied the proven Assets to Action Process™ that addressed four primary phases (and the key questions in each phase):



Key Recommendations

The following recommendations from Hayes Group Consulting have been derived from the intense *Discovery* process we conducted (see Plan Sections 2 and 3). They also reflect learning from our many years of experience as economic development practitioners and strategists.

These recommendations are the basis of the goals that are fully described in Section 5, The Plan.

1. Create a **new vision** for economic development (this was one of the highest points of community feedback). See the Vision Statement in Section 5.
2. Partners In Progress should provide the sustained **leadership**, funding for **resources**, and ongoing **communication** for countywide economic development.
3. Partners In Progress should ensure that the **resources** and transactional structure are in place (over time) to successfully **implement this plan**.
4. Focus on **key economic drivers** with the most potential to grow the economy: 1) Healthcare Services and Medical Businesses; 2) Defense/Military; 3) Golf & Sports Recreation; and 4) Manufacturing.
5. Enhance collaboration and attract funding for **rural transformation**.
6. Align plan progress with **measures of success** (key metrics). See Section 7.

2. ECONOMIC OVERVIEW AND ANALYSIS



BUSINESS DEVELOPMENT OPPORTUNITIES IN MOORE COUNTY, NC

Source: NC Department of Commerce, Labor & Economic Analysis Division; April 2017

The Labor and Economic Analysis Division (LEAD) of the Department of Commerce examined economic trends and data in Moore County and among its neighbors to identify potential industry clusters and business development opportunities.

The greatest opportunity for near-term growth exists in expanding Moore's Healthcare and Hospitality industries. Durable goods Manufacturing and Professional/Technical Services are not especially strong, but could be further developed – particularly as a service provider or part of a larger regional supply chain to the Research Triangle and Fayetteville. Workforce training/education and site development will be keys to growing these industries, as they are not particularly strong at the moment.

The two largest industries, Healthcare and Hospitality, are also among the fastest growing. These industries are highly beneficial to the local economy, but both present issues to quickly spreading economic opportunities throughout the county. Hospitality, while a good source of local revenue, is concentrated in and around Pinehurst and Southern Pines and provides low average wages.

The Healthcare industry is a good source of jobs (providing high-paying work in physicians' offices and lower-paying work in retirement centers and home healthcare), but it mostly serves a local market that recirculates dollars through the community. More specialized services and facilities could better attract out-of-county visitors and bring dollars into the county. Additionally, the growth of nursing homes could help continue to draw outside dollars and grow Moore County as a retirement destination.

Based on employment concentrations in surrounding counties, Manufacturing appears to be an intriguing opportunity, particularly in durable products like metal products, machinery, and equipment. By investing in the local workforce and drawing commuters from counties like Lee, Richmond and Hoke, Moore County may possess the talent to attract a manufacturer if an adequate site or facility exists.

A manufacturer may also be drawn to the area to be closer to R&D facilities and buyers in the Research Triangle and Fayetteville. Similarly, Professional and Scientific services could be a source of growth – but that's more speculative at this point.

While skilled professionals have moved to the county – particularly high-ranking retirees from Fort Bragg – growth in this industry has not occurred in a way to suggest there's a concentration strong enough to grow and attract large Professional / Technical services firms by itself.

Proximity to the Army base may be an advantage to technical service firms, and those operations exist in Moore County, but a significant cluster serving the Defense Department has not materialized to date. Whether Moore can compete for those firms with counties in an around the Research Triangle, where for skilled technical talent is abundant, is uncertain.

Population

Based on an evaluation of commuting patterns, Moore County is part of the Pinehurst-Rockingham labor market area within the Sandhills Prosperity Zone. As of Q3 2016, **60% of the jobs** within the three-county labor market area are in Moore County (Montgomery, Richmond, Moore).

For this reason, the cluster analysis considers Moore County the economic center of the region. With a population of 94.5K in 2016, **Moore County is the 29th largest in the state**. Its population growth of 6.8% during the last 5 years has outpaced the statewide pace of 5.1%. Population growth is a positive indicator of economic momentum within the region.

Cluster Analysis

LEAD's cluster analysis included an independent assessment of data looking at industry concentration, growth, and relative growth to the U.S. In addition, EMSI's strategic planning tool was used to verify findings and measure Moore County, and the broader (including all surrounding counties) region, industries as they relate to Earnings, Job Growth, Regional Competitiveness, Regional Specialization and Gross Regional Product.

Based on the set of scenarios evaluated, the top clusters in Moore County are **Healthcare and Hospitality**. Under this methodology, **Manufacturing** also showed potential; however, since many intriguing sub-sectors only comprise a single business or two, we'd be cautious making strategic decisions based on such a limited sample. For example, the Metalworking Technology Cluster's top industry is **Power-Driven Hand tool Manufacturing** (NAICS 333991) which primarily consists of one company, Ingersoll Rand.

However, based on the significant manufacturing employment in neighboring Lee and Richmond counties, potential growth in the northern and southern parts of the county may exist if proper sites are identified.

Industry Analysis

Manufacturing maintained its level of employment and did not experience any net job growth between 2015 and 2016. This was slightly below the growth of the state, which experienced a 1% growth in during the same time-period. Accommodations and Food Services in Moore County and the state both experienced a 2% increase in jobs. Health Care and Social Assistance had highest job growth (3%) compare to the state (1%). Moore County's Health Care & Social Assistance industry also pays well - **12.3% more than the state's average wage**.

Description	Moore County 2015 Jobs	Moore County 2016 Jobs	NC 2015 Jobs	NC 2016 Jobs	Moore County 2015 - 2016 % Change	NC 2015 - 2016 % Change	Moore County Current Wages & Salaries	NC Current Wages & Salaries
Manufacturing	1,815	1,815	461,030	463,806	0%	1%	\$40,549	\$56,516
Health Care and Social Assistance	8,442	8,696	486,796	490,805	3%	1%	\$50,743	\$45,188
Accommodation and Food Services	4,907	4,982	396,131	403,851	2%	2%	\$17,861	\$16,361
	15,164	15,493	1,343,957	1,358,462	2%	1%	\$38,975	\$40,486

The **Health Care and Social Assistance** Industry (NAICS 62) experienced an **8% increase in Moore County** from 2012 to 2016 compared to a 5% increase across the state. The Accommodations and Food Services Industry experienced 15% job growth in Moore County and a 13% increase in North Carolina. **Manufacturing jobs declined 14%** over the five years in Moore County while the state experienced a 6% increase. Despite the decline in jobs, the average **manufacturing wage in Moore County is 8% higher** than the County's overall average wage.

Within the Health Care and Social Assistance Industry, the sectors experiencing the most job growth from 2012-2016 were the following by 4-digit NAICS:

NAICS	Description	2012 Jobs	2016 Jobs	2012 - 2016 Change	2012 - 2016 % Change	Current Wages & Salaries
6239	Other Residential Care Facilities	16	61	45	281%	\$27,772
6241	Individual and Family Services	612	708	96	16%	\$23,735
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	495	568	73	15%	\$22,991
6211	Offices of Physicians	1,446	1,642	196	14%	\$97,323
6213	Offices of Other Health Practitioners	261	288	27	10%	\$40,730
6212	Offices of Dentists	297	327	30	10%	\$60,216
6244	Child Day Care Services	339	367	28	8%	\$21,071
6221	General Medical and Surgical Hospitals	2,862	3,092	230	8%	\$53,207

Within the Manufacturing Industry, the sectors experiencing the most job growth from 2012-2016 were the following by 3-digit NAICS:

NAICS	Description	2012 Jobs	2016 Jobs	2012 - 2016 Change	2012 - 2016 % Change	Current Wages & Salaries
322	Paper Manufacturing	13	34	21	162%	\$88,468
325	Chemical Manufacturing	30	59	29	97%	\$55,183
332	Fabricated Metal Product Manufacturing	54	75	21	39%	\$29,674
311	Food Manufacturing	15	20	5	33%	\$33,716
335	Electrical Equipment, Appliance, and Component Manufacturing	55	69	14	25%	\$40,329
321	Wood Product Manufacturing	173	215	42	24%	\$29,407
339	Miscellaneous Manufacturing	27	33	6	22%	\$37,865

Defense Contracting

Defense contracting is not considered an industry, but rather a collection of businesses that span industries, such as manufacturing, services, and research and development. As such, tracking activity, growth, and potential using traditional economic data is not possible. Since service contractors tend to cluster in proximity to their customers, it's logical to look at Moore County's potential to serve Fort Bragg.

According to data received from the North Carolina Military Business Center, Moore County was home to 22 business establishments with active contracts with the U.S. Department of Defense in 2016. This ranked 16th among North Carolina's 100 counties and 20th as a percentage of total private county businesses. While more detail and additional years of data should be analyzed to evaluate Moore's full potential, the modest numbers in 2016 do not signal a significant strength currently.

Job Growth Since The Great Recession

NAICS	Growing Industries	2015 Jobs	Job Growth 2007 to 2015	% Growth
62	Health Care and Social Assistance	8,405	1,191	17%
72	Accommodation and Food Services	4,899	787	19%
44	Retail Trade	4,437	345	8%
56	Administrative and Support and Waste Management and Remediation Services	1,436	323	29%
55	Management of Companies and Enterprises	266	246	100%+
81	Other Services (except Public Administration)	998	140	16%
52	Finance and Insurance	716	39	6%
53	Real Estate and Rental and Leasing	392	36	10%
92	Public Administration	1,693	29	2%
51	Information	280	18	7%

NAICS	Declining Industries	2015 Jobs	Job Growth 2007 to 2015	% Growth
23	Construction	1,422	(863)	-38%
31	Manufacturing	1,817	(438)	-19%
71	Arts, Entertainment, and Recreation	1,123	(287)	-20%
54	Professional, Scientific, and Technical Services	1,055	(91)	-8%
42	Wholesale Trade	481	(91)	-16%
11	Agriculture, Forestry, Fishing and Hunting	215	(55)	-20%
61	Educational Services	2,782	(35)	-1%
48	Transportation and Warehousing	584	(32)	-5%
22	Utilities	81	(24)	-23%

Projections

Below are industries in the Pinehurst-Rockingham labor market area that are projected to have job growth from 2014 to 2024. The top industry for job growth by total net change is **Nursing and Residential Care Facilities** (1,067). Professional, Scientific, and Technical Services (NAICS 541) also will experience job growth during that same time period. Establishments in this industry are engaged in processes where human capital is the major input.

These establishments make available the knowledge and skills of their employees, often on an assignment basis, where an individual or team is responsible for the delivery of services to the client. This includes Scientific Research and Development Services, Computer Systems Design and Related Services. Legal Services, Architectural and Engineering Related Services, Management, Scientific, and Technical Consulting Services as well as other service type industries.

NAICS Code	Industry Title	2014	2024	Net Change	Total	Annualized	Area Name
488	Support Activities for Transportation	167	240	73	43.70%	3.70%	Pinehurst-Rockingham
551	Management of Companies and Enterprises	689	987	298	43.30%	3.70%	Pinehurst-Rockingham
623	Nursing and Residential Care Facilities	2,770	3,837	1,067	38.50%	3.30%	Pinehurst-Rockingham
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	1,092	1,482	390	35.70%	3.10%	Pinehurst-Rockingham
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	115	151	36	31.30%	2.80%	Pinehurst-Rockingham
541	Professional, Scientific, and Technical Services	1,432	1,804	372	26.00%	2.30%	Pinehurst-Rockingham
622	Hospitals	3,716	4,563	847	22.80%	2.10%	Pinehurst-Rockingham
446	Health and Personal Care Stores	528	645	117	22.20%	2.00%	Pinehurst-Rockingham
624	Social Assistance	1,700	2,053	353	20.80%	1.90%	Pinehurst-Rockingham
237	Heavy and Civil Engineering Construction	525	633	108	20.60%	1.90%	Pinehurst-Rockingham
722	Food Services and Drinking Places	4,346	5,192	846	19.50%	1.80%	Pinehurst-Rockingham
238	Specialty Trade Contractors	1,477	1,756	279	18.90%	1.80%	Pinehurst-Rockingham
452	General Merchandise Stores	1,599	1,884	285	17.80%	1.70%	Pinehurst-Rockingham
451	Sporting Goods, Hobby, Book, and Music Stores	259	305	46	17.80%	1.70%	Pinehurst-Rockingham

Commuting Patterns (Private Primary Jobs)

Commuting patterns reveal the degree to which a county is economically interdependent with its surrounding geographies. The number of net commuters from a region is derived by subtracting the number of workers commuting to jobs in a region from the number of workers traveling to jobs outside of the same region.

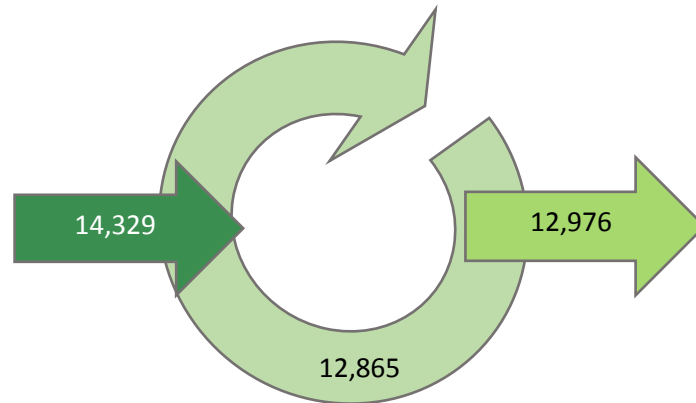
Based on the 2014 commuting patterns for primary private-sector jobs, Moore County has an estimated 12,865 persons who live and work in the county. A similar number of workers (12,976) are leaving Moore County to work in surrounding counties. Highlighting the county's importance as a regional economic center, a larger number of workers commute into the county for jobs (14,329).

The largest number of workers coming into the county are from Richmond (1,677) and Hoke (1,095). More leave the county for work in Cumberland (1,332) and Wake (1,235) than any other. **Fifty percent of Moore County residents work within the county.**

Less than half of the commuters (34% or 9,197) traveling to Moore County have jobs in service industries. About 13% work in Trade, Transportation, and Utilities industries, while the rest (6%) work in the goods producing industries. A similar distribution of jobs can be seen for workers leaving for work outside the county with a higher share of jobs in service industries (24% or 6,248) Trade, Transportation, and Utilities (15%), and goods producing (11%) industries. Sixty-eight percent of the people who live in Moore County and work in private primary jobs, earn less than \$40k per year.

Overall, Moore County has **more workers commuting inside (1,353) Moore County than commuting out.** As the following chart and table indicate, activity in Moore County is interconnected with neighboring counties which is critical for regional planning purposes.

Moore County Worker Inflow and Outflow, 2014 (Private Primary Jobs)



Primary Jobs outside of Moore County filled by residents	12,976
Primary Jobs in Moore County filled by residents	12,865
Primary Jobs in Moore County filled by outside workers	14,329

Note: Data only includes people working in NC, VA, TN, GA, and SC

Largest Private Sector Employers			
1	First Health of the Carolinas	6	Harris Teeter
2	Pinehurst Llc	7	Food Lion
3	St. Joseph of the Pines Hospital Inc	8	Pinehurst Surgical Clinic P A
4	Pinehurst Medical clinic Inc	9	Lee electrical Construction Inc
5	Wal-Mart Associates Inc	10	Lowes Food Stores Inc

3. PRIMARY RESEARCH



Existing Studies ■ Strategic Interviews ■ Community Web Survey ■ Focus Groups

Building on the analysis provided by the NC Department of Commerce (Section 2), Hayes Group Consulting conducted data scanning and compilation of existing studies, plans, profiles, and reports for their relevance to Moore County. Plans from counties adjacent to Moore have been carefully reviewed due to their potential regional economic development implications.

These studies, plans, etc. are available from the Moore County Partners In Progress office:

Existing Studies, Plans, Profiles, and Reports

Cluster Plans/Studies	Source	Date
Bioscience Innovation in the States	Biotechnology Innovation Org.	2016
Defense Asset Inventory and Target Industry Cluster Analysis	NC Military Foundation	2009
Entrepreneurial Growth and Recruitment Strategy	Sanford Holshouser Economic Development Consulting, LLC	2014
Medical Device Industry	Select USA	2017
Medical Technology Report, Pulse of the Industry	EY	2016
Military Supply Chain Mapping	NC Defense Industry Diversification Initiative	2016
NC Megaside Corridor Asset Map	Greensboro-Randolph Foundation	2017
NC's Advanced Industries	Brookings Institute	2013
Northern Moore County Tourism	Convention & Visitors Bureau	2017
Target Industries	NC Southeast Reg. Partnership	2017
Top Medical Device Hubs	Business Facilities' 12th Annual Rankings Report	2016
County/Regional Plans/Studies	Source	Date
Arts and Economic Prosperity IV (in Moore County)	Americans for the Arts	2012
Business Development Opportunities In Moore County	NC Department of Commerce	2017
Chatham County Economic Dev. Strategic Action Plan	Chatham County EDC	2015
Comprehensive Economic Development Strategy	Triangle J Region	2012
Fayetteville Cumberland Economic Dashboard	Fayetteville Cumberland EDC	2017
Harnett County Comprehensive Growth Plan	Harnett County EDC	2015
Lee County Strategic Action Plan	Lee County EDC	2013
Midland Road Corridor Study	Kimley-Horn	2016
Moore County Land Use Plan	Moore County Planning & Community Development	2013
Moore County Partners in Progress Overall Study Results and Summary	Kline	2013
Randolph County Strategic Plan	Randolph County	2016
City/Town Plans	Source	Date
Asheville Vision 2020 Plan	TIP Strategies	2015
State of the Town Report, Carthage, NC	Board of Commissioners	2014
Town of Aberdeen Goals and Objectives	Board of Commissioners	2016
Town of Robbins Master Plan	Town of Robbins	2014
Town of Southern Pines Comprehensive Long Range Plan	Town Council	2013
Village of Pinehurst Strategic Operating Plan	NC State University	2016
County Profiles	Source	Date
County Profile (Moore County)	NC Department of Commerce	2017
County Profile (Moore County)	NC Southeast (ESRI)	2017

Strategic Interviews

This section provides a summary of the interviews conducted by Hayes Group Consulting designed to inform Moore County economic development planning. [Refer to appendix #4 for the Summary Report.](#)

The interviews took place from mid-January to early April 2017. For the interview process, Hayes Group Consulting received guidance from Partners in Progress and other key community leaders to identify interviewees.

Interviewees were targeted due to their knowledge of Moore County economic development issues and their perspectives on their specific sectors and industries. Attention was given to identify folks not only due to their business and community perspectives, but also to ensure geographic coverage throughout Moore County.

The people interviewed and their respective organizations appear on pp. 13-15 of the Summary Report. The majority of interviews were conducted in person. Depending on schedules, some were done by phone. Ground rules for all interviews included their being anonymous, free, and open.

A key objective of this project is to expand the dialogue across the County for economic development. In that regard, 68 interviews were conducted. [The 11 interview questions](#) (below) were designed specifically for Moore County to address its key issues. The questions were provided ahead of time to interviewees, and administered to ensure consistency in the compilation of feedback.

1. What do you see as assets (positive drivers <u>for jobs</u>) of the Moore County economy?	2. What are some ways to <u>OPTIMIZE</u> the current assets?	3. What do you see as barriers to the county's economic growth in the near term? In the long term?
4. What do you see as possible solutions to the barriers described in question #3	5. On a scale of 5, how satisfied are you with the state of the Moore County economy	6. What are some ways to <u>DIVERSIFY</u> the Moore County economy?
7. The northern and southern parts of Moore County have different economic dynamics. What are needs that need to be addressed in each area?	8. What are some ways to work together, to partner in order to address the needs above?	9. In your experience, have you seen a county like Moore that's done a good job in addressing the kinds of needs and issues we've discussed?
10. Are there any other ideas you can offer relevant to Moore's economic development? Feel free to Include any ideas – even those that may be “outside the box.”	11. What further advice do you have for us as we move ahead on this project in Moore County?	

The Strategic Interview Summary Report was presented as part of a plan-process update to the Partners In Progress Board on May 9, 2017. The summary presentation is reproduced below:

<p>Q1: What are the Assets for our economy?</p> <ul style="list-style-type: none"> Healthcare Location Sandhills Community College Military (proximity to Ft. Bragg) Home of American Golf® Quality of Life <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> Protect what makes us special County has changed; jobs Had attracted retirees, less Healthcare—opportunity Military—business connection Community College—key resource <p>Healthcare and the Community College help us see ourselves as one County.</p>	<p>Q2: What are some ways to OPTIMIZE the current assets?</p> <ul style="list-style-type: none"> Healthcare; expand services Healthcare; attract businesses Sandhills Community College Military (related businesses) Home of American Golf® Tell our Story <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> Hospital/healthcare is a fluid-dynamic business. Military offers talent. Military Businesses. Build golfing brand. <p>Maintain our charm. Don't lose what we have for sake of growth.</p>
<p>Q3: What are BARRIERS to economic growth?</p> <ul style="list-style-type: none"> Traffic/transportation (vision) Future of golf? (Peaked?) Bifurcation/politics/county Education Lack of natural gas MFG weak Military (turnover) <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> North and South. Need to lose feeling that we are two counties. Appreciate where county is economically challenged. All levels of gov't need to work together. Club generation is aging. <p>Long term – no clear vision for economic development.</p>	<p>Q4: What are SOLUTIONS to Barriers?</p> <ul style="list-style-type: none"> Strategic Plan Healthcare Leverage "Home of Am. Golf" Military Leverage Community College Schools Leadership Tell Story <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> Healthcare business cluster Links to Ft. Bragg; business Home of American Golf® Expand agri-business Become a tourism "nexus" <p>Use strategic plan. Find common ground.</p>
<p>Q5: On a scale of 5, how satisfied are you with the state of the Moore County economy?</p> <ul style="list-style-type: none"> Countywide = 3.62 Southern Moore = 3.67 Northern Moore = 3.44 <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> Depends on perspective; need to address needs of North and South. Bifurcation/rural-urban divide. Better than those around us. PIP and Commissioners need to work together more closely. Need to look for new ways to develop economy. 	<p>Q6: What are ways to DIVERSIFY the economy?</p> <ul style="list-style-type: none"> Healthcare Military Live Anywhere, Work Anywhere Tourism "nexus" Business capital/enterprise fund <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> Focus on high-level job creation. Healthcare sector potential. Leverage Ft. Bragg (business attraction). <p>If we don't diversify, we are in trouble.</p>
<p>Q7: What are needs of the northern and southern parts of Moore County?</p> <p>NORTH</p> <ul style="list-style-type: none"> Tier 3 status (grants) Lack of Vision, BHAG Change brand/perception <p>SOUTH</p> <ul style="list-style-type: none"> Traffic/transportation Future of golf Military population influx Planning among municipalities <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> North & South – economies vastly different MFG – just want it back Military population: positives and challenges <p>Need to see ourselves as one County.</p>	<p>Q8: What are ways to work together to address needs?</p> <ul style="list-style-type: none"> Leadership, Collaboration, Communication, Relationships Vision Design/conduct forums Close gap – North & South PIP as platform Adjoining counties Use public-sector talent <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> Elected officials; come together Find common ground Know what's good & happening across Moore Co. Take broad view of economic development <p>PIP – PLATFORM: Leadership, Education</p>

<p>Q9: Have you seen a county like Moore that's done a good addressing their issues?</p> <p>7 counties similar to Moore; they have a two-tier difference between municipalities and the county.</p> <ol style="list-style-type: none"> 1. Johnston 2. Watauga 3. Caldwell 4. Davie 5. Lincoln 6. Transylvania 7. Chatham <p>Difficult to identify counties and places that are like Moore.</p>	<p>Q 10: What are "outside the box" ideas for Moore County economic development?</p> <ul style="list-style-type: none"> ▪ Next generation of leaders ▪ Military businesses ▪ UNC Pembroke here ▪ Market rural Moore to suburban Moore ▪ More companies like SITUS <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> ▪ What are our BHAGs? ▪ Find creative ways to be cohesive; set direction. <p>Innovate: Facilitate "thinkers" over time re: economic development.</p>
<p>Q 11: What further advice for moving ahead in Moore County?</p> <ul style="list-style-type: none"> ▪ Find common ground; bring Northern Moore into discussion ▪ Create Vision ▪ Dialogue – like strategic plan ▪ Don't leave the plan on shelf ▪ New leaders for the future <p>REPRESENTATIVE COMMENTS:</p> <ul style="list-style-type: none"> ▪ Market pressures moving at a speed that can outstrip. ▪ If we don't invest in the economically distressed areas, there will always be strained relationships. <p>We are at a crucial point. We can be left behind.</p>	

Key Value of Strategic Interviews

The value in conducting the Strategic interviews and the feedback we gathered exceeded our expectations. There are now greater opportunities to build upon and sustain these outcomes to help ensure the economic future of Moore County:

- Expanded economic dialogue.
- Greater buy-in to the strategic planning process, and ultimately the Plan.
- Specific, targeted strategies designed for greater return on effort.

Community Web Survey

This section provides a summary of the Community Web Survey conducted by Economic Leadership, LLC. . Refer to [appendix #5](#) for the full report.

The survey was conducted during April 2017. Feedback from the Strategic Interviews greatly informed the questions and design of the web survey.

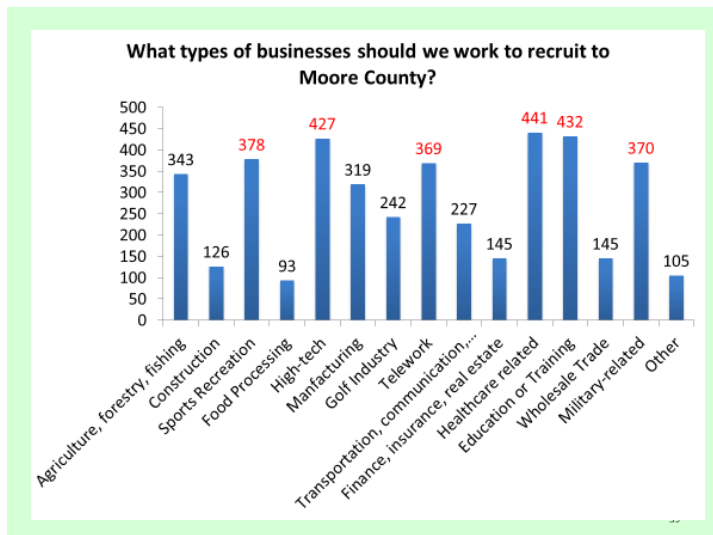
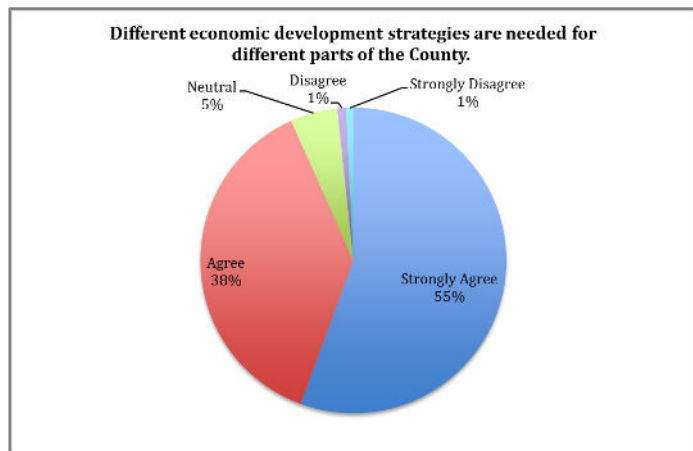
To reach respondents across Moore County, the Pilot Newspaper was used as well as direct links to community groups and specific organizations that Partners In Progress provided. Response was exceptional with 1,011 people completing the Survey. This demonstrated a very high degree of interest in the future of Moore County economic development.

Results of the Community Web Survey was presented to the Partners In Progress Board on May 9, 2017. Key findings are summarized below.

This graphic shows that 93% of people agreed that Moore County needed different strategies to address the different types of economies throughout the County.

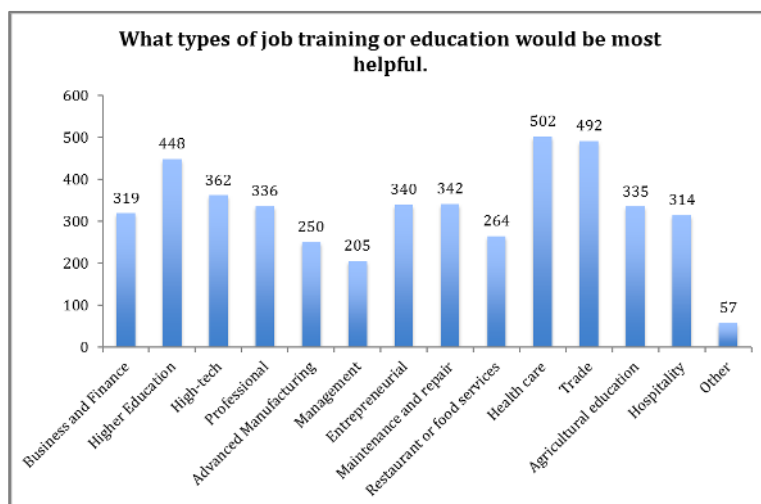
This is especially true for the Northern vs. the Southern parts of the Moore County.

This data point underscored feedback received during the Strategic Interviews.



The question of what types of businesses can be attracted is always key. The highest rankings again correlated with the Strategic Interviews:

- Healthcare-related
- Education/Training
- High-tech
- Sports recreation
- Military-related
- Telework (work from anywhere)



Closely connected to the types of businesses targeted for recruitment is the types of training and education needed.

This chart shows respondents' rankings for education with healthcare receiving the most votes.

Trade, higher education, and high-tech were next in the rankings.

The Sandhills Community College is the primary workforce resource to help fulfill training and education needs.

In order to get feedback on Economic Development priorities, we posed the question: "I would support the dedication of more time and resources to..."

From both these slides, it is evident that on a scale of 1-5, all these items received a Strongly Agree and Agree ranking.

Economic Development Priorities	
(1) Strongly Agree; (2) Agree; (3) Neutral; (4) Disagree; (5) Strongly Disagree	
"I would support the dedication of MORE TIME AND RESOURCES to..."	
1. Having strong policies to maintain environmental quality .	(1.70)
2. Helping retain and expand existing businesses .	(1.72)
3. Enhancing broadband .	(1.80)
4. Enhancing small town beautification through programs such as Main Street revitalization.	(1.80)
5. Investing in infrastructure (including natural gas, water/sewer, etc.).	(1.90)
6. Actively recruiting appropriate business prospects.	(1.96)
7. Attracting facilities in the northern part of Moore County .	(1.97)
8. Providing resources (such as an Enterprise Fund) to grow small businesses.	(1.98)
9. Providing Entrepreneurship Training & Assistance.	(2.02)

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Economic Development Priorities	
(1) Strongly Agree; (2) Agree; (3) Neutral; (4) Disagree; (5) Strongly Disagree	
"I would support the dedication of MORE TIME AND RESOURCES to..."	
10. Attracting professional firms that can locate and work from anywhere .	(2.03)
11. Attracting healthcare-related businesses.	(2.06)
12. Exploring partnerships with surrounding counties for regional economic development.	(2.10)
13. Taking advantage of the proximity to Ft. Bragg for business-development opportunities.	(2.25)
14. Growing & attracting advanced manufacturing companies.	(2.31)
15. Attracting resort-related businesses (such as golf equipment, turf, etc.)	(2.59)
16. Building on the Home of American Golf® "brand."	(2.61)
17. Developing commercial/industrial sites .	(2.69)

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From both slides notable topics that informed the strategic plan include:

- Environmental quality (maintaining the quality of life)
- Support of existing businesses
- Investing in infrastructure
- Attracting businesses to northern Moore
- Establishing an "Enterprise Fund" (for business and entrepreneurship)
- Attracting healthcare-related businesses
- Taking advantage of proximity to Ft. Bragg
- Growing & attracting manufacturing
- Building on the golfing brand and legacy

One of the highest points of feedback from the Strategic Interviews was the lack of an economic vision for Moore County.

In that light, the insights gained from respondents to the Community Web Survey were valuable. The insights further informed creation of the new Vision Statement for Moore County economic development (see section 5).

What is your vision for Moore County 15 years from now?

- Kind of an Asheville East... strong medical and high-tech...
- Regional destination for recreation, dining, shopping...
- Continue to be a competitive area for business while maintaining our small town feel.
- Capitalize on military businesses and tech companies not easily affected by a down economy...
- Thriving, vibrant community, known for education (best in State) and healthy business community...
- Known as excellent place to raise a family – away from metro areas...
- Collection of family-friendly, environmentally-savvy communities...
- Preserve unique, historic charm... balancing a contemporary, progressive look...



Summary of Findings

Strategic Interviews & Community Web Survey

The following **areas of focus** were underscored by the Strategic Interviews and the Community Web Survey:

- Need for **vision** and enhanced economic **leadership** to find common ground and enhance collaboration.
- Opportunities to focus on the **Healthcare & Medical Sector** as a prime asset for economic development. This includes expanding healthcare services/facilities and attracting medical businesses (e.g., medical device manufacturers).
- Ability to use the proximity to **Fort Bragg** and the connection to the NC Defense cluster to grow and attract military businesses.
- Importance of gaining leverage from the **Home of American Golf®** brand for economic development.
- Need for revitalization of **rural Moore County** – in areas of beautification, agribusiness, tourism, and the attraction of firms.

Focus Groups

The need for a broader scale set of focus groups emerged from the Strategic Interviews. A total of 53 people attended the focus groups. Because of the interrelated nature of certain focus groups, some people attended more than one.

The focus groups took on an intensity that was very beneficial especially for identification of strategies. In addition, the individuals who attended the focus groups are now more attuned to be potential Task Force members for plan implementation (Section 6).

Our focus group methodology allowed each person to have time to write their thoughts. This led to thoughtful group discussion. Each person's notes were collected for transcription/summary. Summaries of each focus group session, including the questions used, can be found in the Appendices (Section 9).

Each focus group is summarized below. They are 1) Healthcare & Medical businesses; 2) Defense & Military related businesses; 3) Golf & Golf related businesses; 4) Manufacturing; 5) Rural Moore (Revitalization & Business Enterprise; 6) Rural Moore (Tourism); and 7) Rural Moore (Agribusiness).

Healthcare & Medical Businesses

Focus Group Attendees:

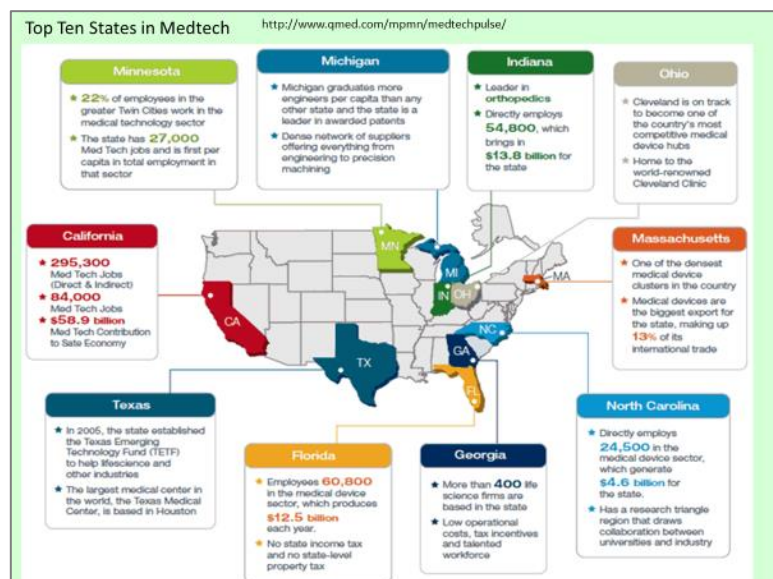
- | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> ■ Dave Kilarski – FirstHealth of the Carolinas ■ Ron Layne – Sandhills Community College ■ Bob Grimesey – Moore County Schools ■ Mike Metcalf – Moore County Schools ■ Amy Graham – FirstHealth of the Carolinas ■ John Krahner – FirstHealth of the Carolinas ■ Nancy Kaeser – FirstHealth of the Carolinas Board ■ Steve Yost – NC's Southeast Partnership | <ul style="list-style-type: none"> ■ John May – Partners in Progress ■ Gretchen Kelly – FirstHealth of the Carolinas ■ Jeff Frederick – UNC-Pembroke ■ Jim Faircloth – Pinehurst Medical Clinic ■ Chris Miller – FirstHealth of the Carolinas ■ Colleen Dolgan – Retired, Cleveland Clinic ■ Pete Pellerito – BIO ■ Brian McMurray – ATEX Technologies, Inc. |
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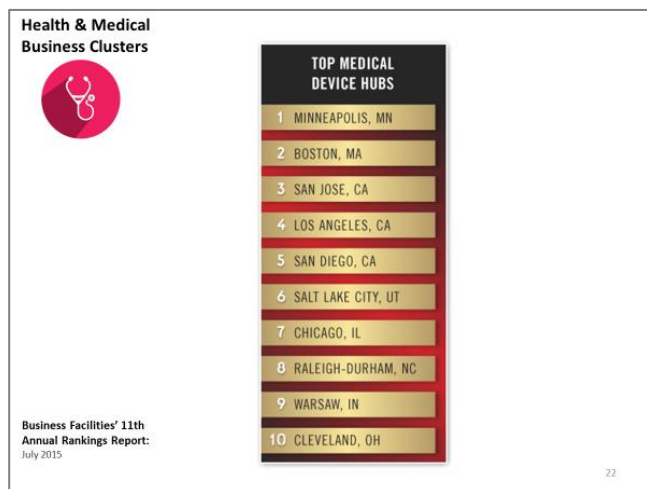
The following information was presented to the health/medical focus group. In addition, The NC Department of Commerce study (Section 2) found that "... The greatest opportunity for near-term growth exists in expanding Moore's Healthcare and Hospitality industries... More specialized health services and facilities could better attract out-of-county visitors and bring dollars into the county."

Data from Qmed (MD+DI) shows that NC is one of the top 10 states in medical technology companies (2013).

In addition, this source cites how the Research Triangle gives NC a unique advantage when it comes to material science breakthroughs in medicine.

Link: <https://www.mddionline.com/top-10-states-medtech-infographic>





This chart shows that Raleigh-Durham is one of the top ten medical device hubs (2015).

Link: <https://businessfacilities.com/2015/07/metro-and-global-rankings/>

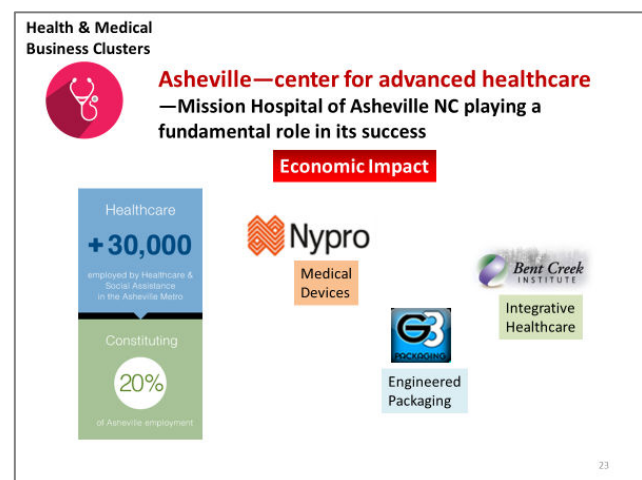
NC is also rated in the top 10 states for medical device manufacturing by the Site Selection Group (2016).

Link: <https://info.siteselectiongroup.com/blog/top-states-for-medical-device-manufacturing>

Data was gathered on other places that have excelled in the health & business cluster. In NC, Asheville has demonstrated success in growing healthcare jobs, and in attracting medical-related businesses.

Notably, the Mission Hospital system plays a leadership role in economic development for Asheville and the region.

Link: <http://www.ashevillechamber.org/economic-development/target-clusters/health-care>



KEY FOCUS GROUP OUTCOMES (Below is a partial listing of highlights. See appendix #6 for the Healthcare/Medical Business Focus Group Summary.)

Types of healthcare services likely to grow:

- Telemedicine
- Telehealth
- Geriatrics
- Dementia-memory care
- Preventative services
- Addiction treatment
- Obesity related (e.g., cardiology, diabetes)
- Palliative care
- Home health services
- Cancer treatment & affiliative services

Types of Health/Med Business to target for attraction:

- Telemedicine center
- Medical device manufacturing
- Regional offices for managed care
- Distribution center (e.g., blood products)
- Health & fitness (e.g., equipment manufacturing)
- Home care
- Develop Moore Co. into health destination (connect to golf & hospitality)
- Clinical trials
- Biodefense

Key actions:

- Determine ways that the Partners In Progress Economic Development office can support Healthcare & Medical business development; identify liaison.
- Capitalize on the “triangle”: a) FirstHealth, b) Fort Bragg, c) UNCP & SCC.

Defense & Military-Related Businesses

Focus Group Attendees:

- | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> Tommy Bolton – Civilian Aide to Secretary of the Army, Fort Bragg Gretchen Kelly – FirstHealth of the Carolinas Carl Kelly – Special Operations active duty Dan Aaron – Home Energy Check LLC Lindsey Farmer – Sandhills Community College Lane Kjellsen – K2 Solutions | <ul style="list-style-type: none"> Ron James (civilian) – Plans, Analysis & Integration Office, Fort Bragg Jeff Sanborn – Village of Pinehurst Brian Canfield, FirstHealth of the Carolinas Jennifer Carlson – Keller Williams Pinehurst Realty Joe Tew – NC Military Business Center |
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The following information was presented to the defense/military focus group. It is noteworthy that resources across the state are collaborating to grow NC's defense economy. Partners include the NC Military Foundation, NC Defense Business Association, NC Military Business Center, NC Department of Commerce, and others. See link:

http://uncserves.northcarolina.edu/research_development/nc_defense_industry.

Here is a link that further addresses ways that NC is mobilizing its Defense Cluster:

Link: <http://www.researchtriangle.org/news-and-events/north-carolina-mobilizes-expand-its-defense-cluster>

For a comparative, this link offers how "A Defense Cluster Grows in Minnesota":

Link: <https://www.entrepreneur.com/article/224862#>



Additionally (for defense/military), the NC Department of Commerce study (Section 2) cited this information:

- Defense contracting is not considered an industry, but rather a collection of businesses that span industries, such as manufacturing, services, and research and development.
- Since service contractors tend to cluster in proximity to their customers, it's logical to look at Moore County's potential to serve Fort Bragg.
- According to data received from the North Carolina Military Business Center, Moore County was home to 22 business establishments with active contracts with the U.S. Department of Defense in 2016. This ranked 16th among North Carolina's 100 counties. While more detail and additional years of data should be analyzed to evaluate Moore's full potential, the modest numbers in 2016 do not signal a significant strength currently.

KEY FOCUS GROUP OUTCOMES (Below is a partial listing of highlights. See appendix #7 for the Defense/Military Focus Group Summary.)

<p>Ways to understand purchasing/supply needs at Ft. Bragg:</p> <ul style="list-style-type: none"> ▪ Connect to Senior Command Group and Garrison ▪ Special Ops Procurement ▪ MICC ▪ USSOCOM ▪ MWR ▪ DPTMS 	<p>Types of Defense/Military Business to target for attraction:</p> <ul style="list-style-type: none"> ▪ Cyber Security ▪ Robotics ▪ Environmental Sciences ▪ Healthcare related (e.g., health tech) ▪ R&D ▪ Drone Surveillance ▪ Tactical gear ▪ Ammunition
<p>Ways to create more direct connection to Ft. Bragg for potential entrepreneurs:</p> <ul style="list-style-type: none"> ▪ Soldier for Life Transition Assistance Center ▪ Career Resource Center ▪ Family Readiness Group ▪ Sandhills Community College (has presence on base) ▪ Social media 	<p>Key actions:</p> <ul style="list-style-type: none"> ▪ Establish connectivity & relationships with military leadership, businesses, etc. ▪ Focus on existing military entrepreneurs and existing military-related businesses. ▪ Evaluate establishing a military business incubator.

Golf & Golf-Related Businesses

Focus Group Attendees:

- | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> ▪ Tom Pashley, President, Pinehurst LLC ▪ Jamie Ledford, President, Eaton Golf Pride ▪ Kelly Miller, President, Pine Needles & Mid Pines | <ul style="list-style-type: none"> ▪ Pat Corso (PIP), former Resort Executive |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|

KEY FOCUS GROUP OUTCOMES (Below is a partial listing of highlights. See appendix #8 for the Golf & Related Businesses Focus Group Summary.)

<p>Ways to diversify and grow golf-related businesses:</p> <ul style="list-style-type: none"> ▪ Attract golf companies to make this their home base ▪ Find businesses and brands that might complement each other ▪ Create innovation lab; learn from universities 	<p>Innovations:</p> <ul style="list-style-type: none"> ▪ Position as the center of golf thought leadership on the future of golf ▪ Look for ways to combine golf and health ▪ Attract golf associations
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Manufacturing

Focus Group Attendees:

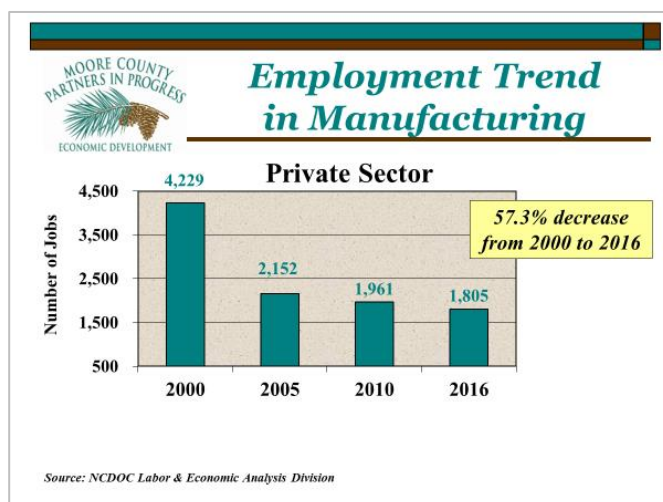
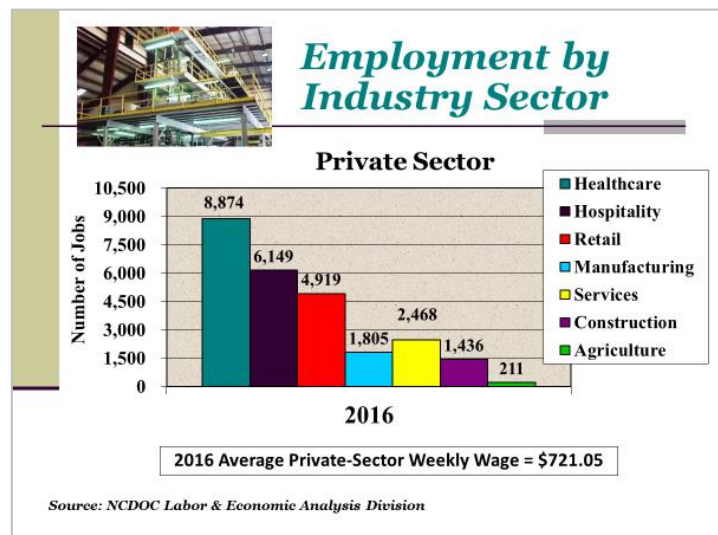
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|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> Andi Korte, SCC Division of Workforce Development & Continuing Education Ronnie Patton – SCC Division of Workforce Development & Continuing Education Dr. Bob Grimesey, Amanda Dixon, Tim Locklair, Mike Metcalf – Moore County Schools | <ul style="list-style-type: none"> Steve Yost – NC's Southeast Partnership Garland Horton – Aberdeen & Rockfish Railroad Pam Graham – Town of Aberdeen Frank Quis – Moore County Board of Commissioners David McNeill – Duke Energy Reagan Parsons – Town of Southern Pines |
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A Manufacturing Situation Analysis was prepared by the Partners In Progress office and presented by Pat Corso to the Manufacturing Focus Group. Highlights are shown below; for the full presentation, [see Appendix #9](#). From the information, it is clear that manufacturing activity and employment has declined sharply in the past 15-20 years. The question is: Are there ways in which Moore County can position going forward for these higher paying jobs?

Looking at employment by industry sector, manufacturing is now among the lower employment industries in Moore County.

Healthcare (and all related jobs including FirstHealth) is the largest and fastest-growing sector.

Understanding this trend may offer opportunities to attract health & medical-related manufacturing enterprises.



A review of employment trends shows that while manufacturing was a leading sector for jobs over decades, there has been a dramatic decline in manufacturing employment.

Just since the year 2000, there has been a 57.3% decrease in manufacturing jobs in Moore County.

According to the NC Department of Commerce analysis (Section 2), there are some growth opportunities in manufacturing for Moore County.

As in most places, growing manufacturing will require investments in site development and in workforce capacity.



Growth Opportunities in Manufacturing Sector

- Durable Goods Mfg: Metal products, machinery & equipment
- Advantage is proximity to R&D facilities and buyers in the Research Triangle and Fayetteville areas
- Investments in workforce education/training and **site development** are keys to growing manufacturing

Source: NCDOC Industry Cluster Analysis - April 2017



Product Comparison - Industrial Park Acreage in Surrounding Counties

Sites included: 100 acres and greater

County	Total Acreage	Largest Site (Acreage)
Chatham	4,870	Moncure Megasite (2,500+)
Richmond	1,932	Pine Hills Park (1,500)
Randolph	1,898	Greensboro Randolph Megasite (1,500)
Lee	1,139	Triassic Site (490+)
Montgomery	918	Mt. Gilead Park (800+/-)
Hoke	834	Hoke County Reg. Park (834)
Scotland	561	Laurinburg/Scot Co Megasite (401)
Harnett	538	Mastin-Baker Site (261)
Moore	215	Iron Horse Park (125)

Source: EDPNC SelectNC database- Available Buildings & Sites

Site development is also called “product” in economic development terms. The comparison on the left shows that there are a number of sites (including megasites) being developed around Moore County.

The Chatham and Greensboro-Randolph sites are seeking companies from across the globe (e.g., automotive, aerospace) that could offer supply-chain opportunities as well.

Moore County has developed the Iron Horse Industrial Park. Here is a link to a drone video of Iron Horse.

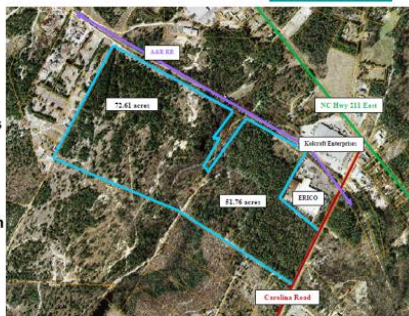
Link: <https://www.youtube.com/watch?v=ZrMPCXsel3k>

There is also the Southern Pines Corporate Park with over 100 acres zoned for planned development.



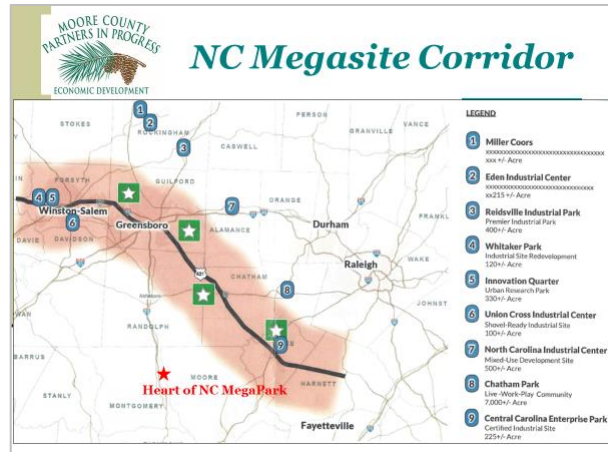
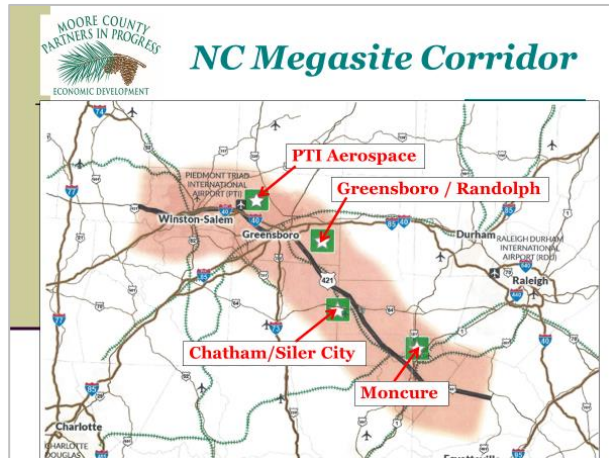
Iron Horse Industrial Park Carolina Road, Aberdeen

- 2 parcels totaling 125 acres
- Only 3 miles from US Highway 1
- Formerly state-certified (all studies completed)
- Served by all utilities
- Excellent rail site served by Aberdeen & Rockfish RR



Video Link

The fact that the NC Megasite Corridor is being developed may offer opportunities for Moore County to gain leverage in growing manufacturing. Note in the maps below that the “corridor” runs proximate to Moore. Efforts are underway to better position Moore County to play a larger and more active role in corridor development, and in attracting manufacturing enterprises who want to take advantage of similar positioning.



KEY FOCUS GROUP OUTCOMES (Below is a partial listing of highlights. See appendix #10 for the Manufacturing Focus Group Summary.)

Strategies to position Moore Co. with the Megasite Corridor:

- Improve the Iron Horse Industrial Park
- Establish relationships with the nearest megasites; be active on the team
- Help megasites leverage Moore’s quality of life to attract tenants in exchange for megasites encouraging supplier companies to locate in Moore
- Conduct inventory of workforce
- Develop Heart of NC Megapark when feasible
- Use political pressure for a state bond referendum

Types of manufacturing “niches” to target:

- Military/Defense
- Golf cluster
- Knowledge-based pharmaceuticals, etc.
- Healthcare cluster
- Smaller advance manufacturing companies
- Equestrian
- Construction/home improvement
- Automotive or Aerospace suppliers (esp. for Chatham and Moncure sites)
- Rural outsourcing

Top 3 things to grow the manufacturing sector:

- Product development (e.g., sites, infrastructure)
- Workforce development (take inventory, quantify the workforce)
- Work with Moore Co. Schools and Sandhills Community College

Focus Groups (Rural Moore County)

Rural Transformation

With the decline in manufacturing and other traditional industries, rural Moore County needs to reshape its economic landscape – and undergo a transformation that creates a new economic future.

To these ends, a series of focus groups was conducted. Each of the focus areas (*Revitalization, Business Enterprise, Tourism, and Agribusiness*) are interrelated in terms of their economic development dynamics.

Also due to the interrelated nature of issues, it was very positive that some of the same elected officials, public sector managers, and community leaders attended more than one focus group. This also resulted in special attention being given to Northern Moore in recognition of its economic challenges.

Rural Moore (Revitalization & Business Enterprise):

Focus Group Attendees:	
<ul style="list-style-type: none"> ▪ Otis Ritter – Moore County Commissioner ▪ Lonnie English – Town of Robbins ▪ Terri Holt – Robbins Town Commissioner ▪ David Lambert – Town of Robbins ▪ Penny Enroth – Palmer Foundation ▪ John Skvarla – Nexsen Pruett ▪ Aaron Cooper – Cooper Ford 	<ul style="list-style-type: none"> ▪ Tom Robinson – Town of Carthage ▪ Charles Hammond – PIP liaison to N. Moore Co. ▪ Kathy Liles – Town of Carthage ▪ Nicole Bozich – Situs ▪ Pat Jackson – Carthage Century Committee ▪ Nikki Bradshaw - Robbins Town Commissioner

Revitalization is driven by a series of factors including beautification and restoration of the physical assets. During this focus group, it was clear that revitalization would also need funding and use of financial tools. The Partners In Progress office is creating an inventory of financial tools – in that regard, this link from SEH is informative: <http://www.sehinc.com/news/some-more-thoughts-economic-revitalization-small-town-downtowns-financial-tools>.

Business Enterprise is intended to create a sustainable enterprise fund for rural Moore business & entrepreneur initiatives.

KEY FOCUS GROUP OUTCOMES (Below is a partial listing of highlights. See appendix #11 for the Revitalization & Business Enterprise Focus Group Summary.)	
<p>Future <i>revitalization</i> projects to fund:</p> <ul style="list-style-type: none"> ▪ Improve town aesthetics; be more inviting for residents and visitors ▪ Enhance existing and create new recreation offerings ▪ Redevelop (or demolish) old vacant buildings ▪ Address problem of building owners not maintaining their property ▪ Work with Moore County to beautify town gateways ▪ Create evening activities (e.g., Alive After Five) ▪ Fund infrastructure improvement 	<p>Most important types of entrepreneur & <i>business enterprise</i> initiatives:</p> <ul style="list-style-type: none"> ▪ Tourism infrastructure (e.g., hotel, restaurants, retail, entertainment) ▪ Urgent care/healthcare facility ▪ New housing/apartments ▪ Building reuse ▪ Main street initiative ▪ Childcare
<p>Key actions:</p> <ul style="list-style-type: none"> ▪ Explore creating our own sources of funding ▪ Consider ways to rebrand rural Moore County ▪ Look for ways for townships, etc. to work together to achieve joint initiatives 	

Rural Moore (Tourism)

Focus Group Attendees:	
<ul style="list-style-type: none"> David Lambert – Town of Robbins Charles Hammond – Retired Ag Extension Director Claire Berggren – Convention & Visitors Bureau Tommy Phillips – Carthage Century Committee Scott & Bobbie Thomas – Thomas Pottery Mark Garner – Foothills Outdoors 	<ul style="list-style-type: none"> Otis Ritter – Moore County Commissioner Tom Robinson – Town of Carthage Mary Holmes – STARworks; From the Ground Up Pottery Kathy Liles – Town of Carthage Deborah McGiffin – Moore County Ag Extension Nancy Gottovi - STARworks

Tourism is likely to play a key role in the economic transformation of rural Moore County. Rural Moore is positioned between some key tourism assets (e.g., golf, pottery, the NC Zoo) – so the opportunity to create a tourism “nexus” or “connector” was expressed by several community leaders during the Strategic Interviews.

At this focus group, the Convention & Visitors Bureau (CVB) provided some valuable information on the state of tourism, and on potential growth areas of tourism for rural Moore County. CVB’s presentation is included as appendix #13.

To be successful in creating tourism links connecting rural Moore County, It will require a new *vision* and *leadership*.

KEY FOCUS GROUP OUTCOMES (Below is a partial listing of highlights. See appendix #12 for the Tourism Focus Group Summary.)	
<p>Vision for tourism in rural Moore:</p> <ul style="list-style-type: none"> The Creative Economy Northern Moore is a destination for tourists Multiple trail systems (i.e., art/sculpture, Pottery, cross-country, historic/heritage, geocaching) Trail encompassing NC Zoo, Seagrove, Star, Robbins, Southern Pines, Pinehurst Tourism infrastructure established (lodging, camping, Airbnb, hotels, B&Bs, restaurants, retail) Deep River & Bear Creek has evolved into a destination – with associate businesses providing equestrian, cycling, canoeing, kayaking, etc. STARworks and Pottery District are promoted 	<p>Tourism areas to target for growth:</p> <ul style="list-style-type: none"> Bear Creek, Deep River Military exercises World-class pottery center Antique shopping/collecting (i.e., Cameron) Wildlife tourism & equestrian Stargazing Manufacturing/industrial tours Agritourism Heritage tourism Resort trips & tours
<p>Key actions:</p> <ul style="list-style-type: none"> Establish leadership/task force to drive strategies Create a unified vision for tourism Connect to the Uwharrie Regional Tourism Partnership Identify ways to “sell” Northern Moore tourism to Southern Moore (why go outside?) 	

Rural Moore (Agribusiness):

Focus Group Attendees:	
<ul style="list-style-type: none"> Jan Leitschuh, Sandhills Farm to Table Cooperative Gary Priest, Sandhills Farmers Cooperative Brian Wilson, Sandhills Farmers Cooperative Davon Goodwin, Ag Innovations Sue Stovall, Paradox Farms Creamery Terry Bryant, NC Pine Needles Producers Association Michael Seawell, Four Oaks Farm 	<ul style="list-style-type: none"> Carol Parker, Cattle Farmer Matthew Parker, Cattle Farmer Kevin Bowen, Organic Livestock Producer Beverly Padgett, Agritourism Moore Co. Equine Events Doug Ragan, Goat Producer Brad Mallow, Carthage Agribusiness Fred Smith, Randolph Electric

The primary purpose of this focus group was to engage thought leaders in new & additional ways to strengthen *agribusiness* across Moore County and the Sandhills Region. The session was conducted using critical-thinking and prioritization techniques. See appendix #14 for the session transcripts.

KEY FOCUS GROUP OUTCOMES (Below is a partial listing of highlights. See appendix #14 for the Agribusiness Focus Group Transcripts.)	
<p>What's Working:</p> <ul style="list-style-type: none"> Interest in keeping agriculture viable here Diversity of markets (people & products) Growing awareness of need for healthy food Horticulturally blessed (soil) <p>What's NOT Working:</p> <ul style="list-style-type: none"> Lack of education for consumers & farmers Shortage of in-demand products Farmer's Markets; lack of entry level opportunities Lack of meat/poultry processing facilities Lack of reliable workforce Land use/conservation of farmland 	<p>Priorities/Opportunities</p> <ul style="list-style-type: none"> Unify co-op groups Establish leadership to coordinate efforts Develop education for consumers & farmers re: what's available to them Gain business assistance to help farmers be financially sustainable Create stable & ready markets for time-sensitive products (i.e., produce) Address shortage of 'in-demand' products Work with Farmers' Markets to enhance entry level opportunities Explore feasibility of meat/poultry facilities

Overall Value of Focus Groups

- Each focus group served as a critical-thinking session, considering opportunities and challenges in each target area.
- Individuals and groups were also able to indicate the priority issues requiring action.
- The key result of all the focus groups was the identification of specific strategies & actions that will serve to fulfill the goals of the strategic plan (see Section 5).

4. SWOT ANALYSIS

The SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) is an accepted best practice for strategic planning. For Moore County, this SWOT has been compiled from several sources. These include the [Strategic Interviews](#), the [Community Strategic Web Survey](#), [Focus Groups](#), and [External Research](#).

S	Strengths	Positive INTERNAL factors that you possess that would be helpful in achieving a goal:	
		<ul style="list-style-type: none"> Healthcare/FirstHealth Community College; its leadership Home of American Golf® brand Location; central NC; close to urban areas Proximity to Ft. Bragg; highly trained military personnel Diversity of topography (Sandhills, Piedmont) Quality of life; charm, lifestyle, low crime Attractive rural countryside 	<ul style="list-style-type: none"> Retired population; socially active Progressive government leaders at town level Equestrian/horse country Available land Available water Micropolitan hub; Retail hub Agribusiness Diversity of cultures Quality of schools
W	Weaknesses	Negative INTERNAL factors that you possess that would be helpful in achieving a goal:	
		<ul style="list-style-type: none"> Traffic/transportation; lack of unified vision Golf/resort; not robust growth as in past Bifurcation/politics; lack of collaboration Education system needs attention Lack of natural gas Tier 3 classification (challenge for North) Retail means lower paying jobs 	<ul style="list-style-type: none"> MFG declined Lack of certified sites/buildings Small town/building appearance (North) Military; turnover, real estate impact Lack of skilled workers Reluctance to raise taxes-even for schools Lack of entertainment facilities (kids Infrastructure; water/sewer
O	Opportunities	Positive EXTERNAL directions through using STRENGTHS and overcoming WEAKNESSES and THREATS:	
		<ul style="list-style-type: none"> Healthcare-specialized services/facilities, medical businesses (incl. nursing & residential care) Defense/military related businesses Leverage golf/brand Attract professionals- live/work anywhere Create tourism nexus Funding for education/schools Business capital/enterprise fund Enhance leadership; leverage Partners In Progress 	<ul style="list-style-type: none"> Agribusiness Leverage Community College Expand existing businesses Improve highway access MFG; attract subassemblies for large plants located elsewhere Promote equestrian resources Build creative economy (e.g., arts, culture, tourism) Northern Moore water/sewer Tell the story
T	Threats	Negative EXTERNAL factors that could be barriers to attaining a goal:	
		<ul style="list-style-type: none"> Downturn in golf/resort tourism Competition from other areas (State & Nation) Changing demographics (e.g., millennial preferences) 	<ul style="list-style-type: none"> Military; Ft. Bragg status Comfort with status quo; don't change NIMBY Lack of availability of FED/other grants FED & State gov't. policies

5. THE PLAN



Vision

Mission

Goals

Strategies

Using the *Discovery* process, this Strategic Economic Development Action Plan for Moore County has been carefully customized and developed. This is not a “cookie-cutter” plan. Further, its design is intended to be “lean” – to allow the focus on *high-return strategies*. Without this lean nature, plans can “sit on the shelf” being almost impossible to implement. The Plan Capsule (appendix #1) is the core communication tool.

Vision

A key point of feedback in our strategic interviews was the lack of a vision for the economic future of Moore County. Considering economic growth and development, many expressed a strong desire not to lose what has made Moore County special over time (charm, beauty, quality of life). The VISION STATEMENT below attempts to capture these dynamics.

A VISION STATEMENT answers the question: ***What will success look like?*** A VISION is inspiring. It is a beacon in a turbulent world. It prepares for the future, but honors the past.

Below is the new Economic Development VISION that we are recommending for Moore County. In preparing this statement, we paid attention to broad-based feedback to preserve what is special about Moore County.

VISION:

To be a national leader in growing a well-diversified county economy – proud of our rural heritage – recognized as a destination with world-class amenities, and for preserving our unique Moore County charm.

Invest in the Vision

The *Vision* must also be a call for action, a call to come together and support Moore County. The graphic below provides reasons to “invest” in the Moore County VISION. Notably, it takes leadership with a range of champions to give voice to the *Vision*.

The “INVEST” message (below) with its four pillars – 1) Economic Leadership, 2) Economic Positioning, 3) Quality of Place, and 4) Key Economic Drivers – can help communicate how Moore County is distinctive. It has relevance to the ultimate BRAND that will be developed.



Mission

A MISSION STATEMENT answers the question: ***What are we here to do, and why?*** It is a statement of purpose, a reason for existence. It should be developed in light of who the stakeholders are and how public value can be created.

We have maintained the existing MISSION that Partners In Progress has been implementing for several years. This plan offers a key set of goals and metrics to help fulfill that Mission.

MISSION:

To increase economic prosperity and improve the quality of life for Moore County's citizens through the creation of quality jobs and capital investment in our communities.

Goals



In developing the Plan GOALS, we have endeavored to fulfill the charge given by Partners In Progress to:

- Address the economic differences between the northern and southern parts of the County.
- Identify solutions for specific issues that are barriers to economic growth and development.
- Optimize distinctive Moore County assets.
- Explore ways to diversify and grow the tax base.

Note that the Goal Areas below address Leadership/Resources and the Moore County Brand in addition to the key economic drivers.

GOAL Areas	GOAL Statements
I. Leadership & Resources	GOAL 1: Ensure sustained leadership and resources for economic development.
II. The Moore County Brand	Goal 2: Inspire & excite (internally & externally).
III. Healthcare & Medical Businesses	Goal 3: Expand healthcare jobs/facilities; attract medical businesses.
IV. Defense & Military Businesses	Goal 4: Optimize the proximity to Fort Bragg and the opportunities within the NC Defense Cluster.
V. Golf & Sports Recreation Businesses	Goal 5: Capitalize on the Home of American Golf® brand and other key sports assets.
VI. Manufacturing	Goal 6: Attract & grow artisanal, niche, and small-to-midsize manufacturing.
VII. Rural Transformation	GOAL 7: Transform rural Moore County with enhanced collaboration – and focus on revitalization, business enterprise, tourism, and agri-business.

Strategies

The STRATEGIES (under the GOALS below) have been carefully developed using external research, the strategic interviews, and the community web survey. As covered in Section 3, use of the Focus Groups allowed us to engage thought leaders to specify strategies and the attending actions. (For greater detail into actions, refer to the Action Matrix, appendix #2.)



I. LEADERSHIP & RESOURCES

GOAL 1: Ensure sustained leadership and resources for economic development.

STRATEGIES

1. Engage task forces to deploy and sustain this plan.
2. Utilize existing channels and establish new events to ensure county-wide communication and ongoing feedback.
3. Develop funding sources and other resources to fuel economic growth.
4. Ensure fulfillment of leadership and board succession.



II. THE MOORE COUNTY BRAND

GOAL 2: Inspire & excite (internally & externally).

STRATEGIES

1. Capitalize on existing marketing resources/technologies for economic development messaging.
2. Develop programs for internal storytelling for citizens and local influencers.
3. Utilize the marketing efforts of key partners.
4. Design/apply the story to targeted business sectors.



III. HEALTHCARE & MEDICAL BUSINESSES

GOAL 3: Expand healthcare jobs/facilities; attract medical businesses.

STRATEGIES

1. Establish/sustain the strategy team with PIP, FirstHealth and other key resources.
2. Determine health services/facilities as priorities for expansion.
3. Develop criteria; target medical businesses for attraction.
4. Assist in development of needed healthcare/medical workforce.
5. Support existing, entrepreneurial, and start-up health/medical businesses.



IV. DEFENSE & MILITARY BUSINESSES

GOAL 4: Optimize the proximity to Fort Bragg and the opportunities within the NC Defense Cluster.

STRATEGIES

1. Engage & sustain partner resources to help drive strategies.
2. Gain key relationships with Ft. Bragg; determine budget/spending for material needs.
3. Determine key business targets and appropriate actions to attract.
4. Provide support /technical assistance to existing military businesses.
5. Create platform/environment for military entrepreneurial business growth.



V. GOLF & SPORTS RECREATION BUSINESSES

GOAL 5: Capitalize on the Home of American Golf® brand and key sports assets.

STRATEGIES

1. Position Moore County as the thought leadership center on the future of golf.
2. Attract additional golf companies to make Moore County their base.
3. Advance development of sports and sports facilities.
4. Enhance Moore County as an equestrian destination.



VI. MANUFACTURING

GOAL 6: Attract & grow artisanal, niche, and key manufacturing enterprises.

STRATEGIES

1. Support/promote growth for existing manufacturing companies.
2. Position Moore County within the Mega-site Corridor.
3. Determine key manufacturing targets to attract; design tactics to fit.
4. Address infrastructure needs to attract & grow manufacturing.
5. Align with partner resources to meet education & workforce needs.

VII. RURAL TRANSFORMATION

GOAL 7: Transform rural Moore County with enhanced collaboration – and focus on revitalization, business enterprise, tourism, and agri-business.



A. Revitalization (sub-goal): Beautify and restore the physical assets of rural Moore County.

STRATEGIES

1. Research and continuously update knowledge of potential funding sources.
2. Address upgrade needs for buildings and properties.
3. Determine ways to support identified initiatives and beautification projects.
4. Upgrade rural Moore County infrastructure.
5. Gain leverage; collaborate with other counties for identified initiatives.
6. Use the revitalization process to help re-brand Northern Moore County.



B. Business Enterprise (sub-goal): Create a sustainable business enterprise fund (minimum 500k) for rural Moore County business & entrepreneur initiatives.

STRATEGIES

1. Catalog and maintain a data base on enterprise-related funding sources.
2. Deploy proven public-private fund-raising programs.
3. Support needs of existing local businesses.



C. Tourism (sub-goal): Create tourism “links” that connect rural Moore County.

STRATEGIES

1. Complete a unified vision statement for Northern Moore tourism; engage leadership.
2. Gain leverage from regional partnerships and regional assets.
3. Focus on areas of tourism poised for growth.
4. Enhance/develop tourism infrastructure & facilities.



D. Agri-Business (sub-goal): Advance agribusiness and the understanding of the value-added nature of agriculture to Moore County.

STRATEGIES

1. Establish leadership to unify all co-op groups.
2. Develop branding & marketing to communicate the value of agriculture.
3. Expand/diversify financial and other resources for agricultural enterprises.
4. Advance agriculture through tourism, farmers’ markets, and events
5. Expand processing facilities for meat/poultry in or near Moore County.
6. Utilize existing service resources for technical assistance/consulting.
7. Enhance workforce capacity for farm enterprises.

6. PLAN IMPLEMENTATION & TRANSACTIONAL STRUCTURE



Leadership/Resources • Action Matrix • Task Forces • Choices

Leadership/Resources

Because strategic plans are notorious for their lack of implementation, this plan states that Goal 1 is to: *Ensure sustained leadership and resources for economic development*. In addition, Strategy 1.1 (under Leadership & Resources) is to: *Engage task forces to deploy and sustain this plan*.

In Moore County, leadership for economic development is primarily represented and driven by the Partners In Progress Board. But through this planning process, others have been engaged who can serve on task forces for plan implementation and potentially fill future leadership roles.

The Partners In Progress Economic Development Office (**EDO**) serves as the frontline resource for economic development management. With this new strategic plan, EDO efforts will take on added intensity for plan implementation. With only a staff of two (Executive Director and Office Manager), the EDO will need additional resources to DRIVE plan implementation. Currently, the office also has two part-time, volunteer staff. Their respective roles in plan implementation will need to be defined.

The first consideration for added implementation capacity is to collaborate with other key stakeholders. Some of the strategic plan tasks can be aligned with what their organizations are currently doing. Other strategic tasks can be taken due to the strategic fit for particular stakeholders. In Moore County, the key stakeholders (partner resources) include:

- Sandhills Community College
- Local county and city government professionals
- The Chamber of Commerce
- The Convention & Visitors Bureau
- FirstHealth and allied resources
- Fort Bragg
- Military Business Center
- NC Southeast Regional Partnership
- Triangle J Council of Government
- Regional Partnership Workforce Development Board
- Small Business Providers (e.g., SBTDC, Cooperative Extension, Industry Expansion Solutions)

In this plan, there are 7 goals (and 4 sub-goals) that contain 47 strategies. We have prioritized all the feedback for potential strategies in order to focus on 4 to 5 (on average) under each goal. The ability to focus on these priority strategies will help set up a more manageable implementation process.

The completion of this strategic plan, and its implementation, marks a big change for how the Partners In Progress EDO will function immediately and over time. While some of the same, routine tasks will be carried out as usual (e.g., responding to client requests), new tools (including systems and processes) will be needed to effectively pursue the new opportunities targeted by this plan. It is also important to note that this is a 3-year plan (2018 through 2020). Timing for completion of strategic actions should be distributed accordingly.

Action Matrix

The implementation of a strategic plan is much like other projects that require process management. Tools and systems & processes are essential. For this plan, we have developed the *Action Matrix* ([appendix #2](#)).

The Action Matrix is the core tool for plan deployment, and for keeping implementation on track over time. It designates LEAD individuals and groups to monitor actions and results. There is also a quarterly reporting requirement to drive actions and timelines.

Special Note: The strategies & actions outlined in the Action Matrix directly reflect input from all the focus groups.

Example: Leadership & Resources

Goal 1.0 Ensure sustained leadership and resources for economic development.							
Strategy 1.1 Engage task forces to deploy and sustain this plan.							
Actions:			Lead	2018	2019	2020	Status-Qtrly. Rep.
1.1.	1	Identify task force lead, members, and roles.	PIP, ext. resources	1/30	Review 1/30	Review 1/30	4/2018
	2	Establish systems, processes, and routines to drive work.	PIP, ext. resources	2/15	Review 1/30	Review 1/30	7/2018
	3	Facilitate sessions; monitor outcomes.	PIP, ext. resources	2/15	Monthly	Monthly	Quarterly
	4	Link work to metrics.	PIP, ext. resources	6/30	6/30	6/30	Quarterly

For presentation purposes, the Action Matrix is in a Word/table format. During actual implementation, this document can be converted into Excel and likely set up on Google Docs for live, electronic interaction. If appropriate, software products (e.g., Smartsheet®) can be utilized. These choices depend largely on how each Task Force decides to operate.

Task Forces

To drive implementation, Task Forces should be set up and aligned with each of the 7 Goal Areas (and the 4 sub-goals under Rural Transformation):

- | | |
|----------------------------------------|---------------------------|
| I. Leadership & Resources | VII. Rural Transformation |
| II. The Moore County Brand | A. Revitalization |
| III. Healthcare & Medical Businesses | B. Business Enterprise |
| IV. Defense & Military Businesses | C. Tourism |
| V. Golf & Sports Recreation Businesses | D. Agribusiness |
| VI. Manufacturing | |

The best source to consider for Task Force members is the individuals who attended the Focus Groups (Section 3). These individuals were invited to the Focus Groups based on their knowledge of Moore County economic development issues and their perspectives on specific industries and sectors. This knowledge can add value to completion of strategies & actions.

For added Task Force capacity, it should also be noted that the other stakeholders/partner resources (e.g., Sandhills Community College, CVB, The Chamber, FirstHealth) can be utilized.

Leads or “Chairs” of each Task Force will be appointed. But, because the Task Forces will largely be filled by volunteers, they will need to be facilitated by the Partners In Progress EDO. Again, this will require additional, specialized resources.

Choices

Having developed this strategic plan, the ability to move forward now depends on choices, future funding, and budget. To fully implement the plan, funding will need to be obtained for additional resources. We are recommending a priority-driven approach over the next three years. We believe it is important to begin plan implementation as early in 2018 as possible.

Most importantly, Partners In Progress will need to determine how to gain the necessary capacity to drive implementation and the Task Forces in order to fully exploit targeted economic development opportunities.

Choices for capacity are either to:

1. Add additional staff to the Partners In Progress EDO:
 - a. Determine temporary or permanent status
 - b. Determine full-time or part-time status; this status will dictate # of staff needed (estimate equivalent of ADDITIONAL 2 full-time staff).
 - c. Prepare position descriptions; establish recruiting process.
 - d. Orient new staff to the Plan.
 - e. Prepare them to facilitate/lead the Task Forces.
 - f. Identify tasks/project staff will focus on directly.
 - g. **Estimated** budget range 120K-140K (year one).

OR:

2. Contract external resources:
 - a. Develop a one-year performance contract, subject to renewal.
 - b. Specify work plan, routines, and schedules.
 - c. With contracted External Resource, consider any other specialty subcontracting needed.
 - d. **Estimated** budget range 90K-130K (year one).

Year One (2018) Priorities

- Establish the Task Forces and systems & processes to drive plan implementation.
- Develop criteria for attraction of high-value business targets across clusters.
- Finalize healthcare/medical task force with FirstHealth and allied resources.
- Gain key relationships with Fort Bragg; evaluate purchasing processes, ways to meet needs.
- Convene overall Rural Transformation Task Force.
- Refine/apply the means to track and measure progress (metrics).
- Establish/maximize the services of the SBTDC, Cooperative Extension and Industry Expansion Solutions to support existing businesses across clusters.
- Determine steps to enhance communication among County and Town government professionals.
- Design and conduct the FIRST annual “State of Moore” Economic Forum.

Year Two (2019) Priorities

- Evaluate effectiveness of added staff/resource professionals; determine capacity needs going forward and need for their continued service.
- Build on the effort of year one and focus on aligning activities for collective impact.
- Evaluate workforce needs emerging from Task Force/cluster strategies.
- Determine the improvement in leadership and countywide communication/collaboration.
- Assess executive leadership role and succession.
- Fill needed board positions.
- Determine best results in cluster areas (healthcare, military, golf/sports, etc.).
- Secure funding for rural revitalization initiatives.
- Address any leadership and/or board succession gaps.
- Establish Business Enterprise fund.
- Evaluate measures of progress (metrics). Address gaps.
- Design and conduct the SECOND annual “State of Moore” Economic Forum.

Year Three (2020) Priorities

By year three we would expect that there will be enough evidence from the efforts of the first two years to establish solid directions for economic development – especially related to priority clusters. Several of the programs and efforts that were established in year one should be producing results.

- Evaluate effectiveness of added staff/resource professionals; determine capacity needs going forward and need for their continued service.
- Evaluate measures of progress (metrics). Address gaps.
- Fill needed leadership and board positions.
- Build on the effort of year two and focus on aligning activities for collective impact.
- Design and conduct the THIRD annual “State of Moore” Economic Forum.

7. MEASURES of SUCCESS (Metrics)



Measurement

Inputs

Outcomes

With the lack of a strategic plan for economic development, Moore County has had no formal approach to setting and tracking measures of success (metrics). With the development of this plan, it is now feasible to translate the vision, mission, goals, and strategies into relevant metrics over time.

According to Economic Leadership, LLC, there is a national economic development trend to better measure activities and outcomes. Return on Investment has become a common discussion among economic development boards and among public boards that provide economic development funding.

The existence of an organizational strategic plan is the key determining factor in whether an organization measures performance. Over 80% of the organizations that track their performance have a strategic plan. Organizations use agreed upon metrics to track performance over time and against goals that have been developed. Business and elected leaders are usually instrumental in the insistence on and development of the measurements.

Job creation and retention is the most common metric, but comes with many problems. Assigning causal credit for the creation of specific jobs, especially indirectly generated jobs, is a problem. Economic developers understand that their efforts are part of a team.

Performance measurement is not for the faint of heart. It takes resources to regularly track performance and there are always challenges. Assigning credit, getting timely and accurate data, and quantifying results can each be difficult.

Despite the challenges, there is a clear and rapid movement toward more metrics in the economic development field. Best practices suggest starting small with a few metrics, having both activity and outcome metrics, creating simple, broadly available dashboards, and getting Board buy-in throughout the development process.

It is also useful to understand the types of measures that are used in many economic development initiatives. Below are examples of typical INPUT measures and common OUTPUT measures:

Examples of typical input measures include:	Common outcome growth measures include:
<ul style="list-style-type: none"> ▪ Visitations to local companies ▪ Regional small businesses receiving assistance and support ▪ Local visits by site location consultants ▪ Media placement of positive editorial content ▪ Site visits for corporate recruiting and projects 	<ul style="list-style-type: none"> ▪ Job growth ▪ Employment growth ▪ Average wage growth ▪ Growth in tax base ▪ New business formations ▪ Growth in agricultural products ▪ Growth in export ▪ Reduction in unemployment rate ▪ Diversified cluster growth

With the adoption of this strategic plan for Moore County, we are able to recommend two levels of specific measures. The first level is the larger, “macro” related to the Vision and the Mission:

From the VISION, the degree to which *the county economy is becoming more diversified* can be measured:

VISION	MEASURES OF SUCCESS:
<i>To be a national leader in growing a well-diversified county economy – proud of our rural heritage – recognized as a destination with world-class amenities, and for preserving our unique Moore County charm</i>	<ul style="list-style-type: none"> ▪ Growth of jobs across areas including healthcare, defense, and manufacturing

From the MISSION, the *creation of quality jobs and capital investment in our communities* are the measures:

MISSION	MEASURES OF SUCCESS:
<i>To increase economic prosperity and improve the quality of life for Moore County's citizens through the creation of quality jobs and capital investment in our communities</i>	<ul style="list-style-type: none"> ▪ Job changes by sector ▪ Increased average wages ▪ Business-community investment

The second level is related to the GOALS (with their accompanying Strategies) that offer direct measures of success:

GOAL Areas	GOAL Statements	MEASURES OF SUCCESS:
I. Leadership & Resources	GOAL 1: Ensure sustained leadership and resources for economic development.	<ul style="list-style-type: none"> ▪ Communication; Annual Economic Forum ▪ Increased funding
II. The Moore County Brand	Goal 2: Inspire & excite (internally & externally).	<ul style="list-style-type: none"> ▪ Feedback from Community ▪ Web activity
III. Healthcare & Medical Businesses	Goal 3: Expand healthcare jobs/facilities; attract medical businesses.	<ul style="list-style-type: none"> ▪ Growth in healthcare jobs & facilities ▪ Increase in the attraction of medical businesses
IV. Defense & Military Businesses	Goal 4: Optimize the proximity to Fort Bragg and the opportunities within the NC Defense Cluster.	<ul style="list-style-type: none"> ▪ Growth in military entrepreneurs ▪ Increased # of military supply-chain related businesses
V. Golf & Sports Recreation Businesses	Goal 5: Capitalize on the Home of American Golf® brand and other key sports assets.	<ul style="list-style-type: none"> ▪ Additional golf companies est. in Moore County ▪ Development of sports facilities
VI. Manufacturing	Goal 6: Attract & grow artisanal, niche, and small-to-midsize manufacturing.	<ul style="list-style-type: none"> ▪ Attraction of key MFG targets ▪ Increase MFG infrastructure
VII. Rural Transformation	GOAL 7: Transform rural Moore County with enhanced collaboration – and focus on revitalization, business enterprise, tourism, and agri-business.	<ul style="list-style-type: none"> ▪ Funding for revitalization projects ▪ Business Enterprise Fund ▪ New Tourism enterprises/jobs ▪ Growth in ag production

Each Task Force will also focus on the actions outlined in the Action Matrix. These actions serve as key INPUT measures. Accountability will be driven by a quarterly reporting schedule. Macro measures (e.g., Vision-Mission level) will be reported annually.

8. RESOURCE TEAM

Hayes Group Consulting

Hayes Group Consulting served as the lead plan developers and lead consultants.

Charles Hayes, Managing Partner

Hayes Group is an economic development consultancy, educational, and advocacy firm. From 1996 to 2016, Charles was the President & CEO of the Research Triangle Regional Partnership (RTRP). During his tenure at RTRP, he provided strategic and operational oversight to an award-winning 15-county regional partnership. Charles served as primary liaison to a 68-member board of directors, executive committee, and numerous development, financial management, and partnership-building initiatives. He has further provided executive management for the RTRP Foundation, Research Triangle Cleantech Cluster, Triangle Tomorrow and Triangle Air Awareness.

Charles has been a leader and served on several high-level organizations including the UNC Board of Governors, NC Economic Developers Association, International Visitors Council, East Carolina University Board of Visitors, NC State Kenan Fellows Board, RTI International, the International Economic Development Council, and the American Economic Development Council.

Charles has also served as a county economic developer (Moore County) and a county manager (Warren County).

Dan Parks, Senior Strategist

Dan is an economic development and business strategist. He has helped lead major strategic economic development initiatives including planning for regional partnerships, counties, small towns, and chambers of commerce.

He has served in several executive roles at NC State University including Senior Director for the Office of Outreach & Engagement. Dan has designed and conducted strategy initiatives for the Governor's Office, UNC-GA, Chancellors, the Department of Commerce, and other public sector entities. Notably, he worked with the Research Triangle Regional Partnership Cluster and the Piedmont Triad WIRED initiatives.

Earlier in his career, Dan was an entrepreneur in the banking/software industry, operating and selling two companies. Dan is coauthor of the book, *Your Entrepreneur EDGE™*, and is a former adjunct faculty member in the Love School of Business at Elon University.

Jan Hayes, Managing Partner

Jan served as executive director of United Way of Lee County for nine years until retiring from the position in April 2016. During her tenure the nonprofit agency emerged from a difficult period of instability to one described by the board chairman as having a firm foundation and highly valued position in the community.

Jan introduced several innovative projects that expanded the organization's influence and reach – from an annual community roundtable to solve specific local problems to Charity Tracker that helps nonprofits coordinate their efforts to help needy families as well as Get Connected, VolunteerLee.com which connects volunteers to opportunities for service in the community.

Jan served on the Lee County Board of Education and is a past chair. She currently serves as President of Sanford Sister Cities and is in her third term on the Central Carolina Community College Board of Trustees.

NC Department of Commerce, Labor & Economic Analysis Division

The NC Department of Commerce (LEAD division) conducted economic research described in Section 2 of this plan.

Jeff Debellis, Manager/Economic & Policy Analysis

LEAD (Labor & Economic Analysis Division) is a one-stop source and leading provider of labor market information for the state of North Carolina. With a staff of researchers, economists, statisticians, and policy analysts, LEAD administers and collects data, conducts research, analyses, reports, and disseminates information on the state's economy, labor force, educational, and workforce-related issues.

LEAD's information and analyses allows for the development of a more complete picture of North Carolina's economy and for more informed policy decisions regarding business recruitment and workforce development.

Economic Leadership, LLC

Economic Leadership helped design and administer the Community Web Survey described in Section 3 (pp. 17-19).

Ted Abernathy, Managing Partner

Ted is the economic development policy advisor to the Southern Governors Association, and the Managing Partner of Economic Leadership LLC, a consultancy that is currently working in more than a dozen states to develop economic strategies. Ted has 35 years of experience in directing economic development and workforce development programs. In the past two years Ted has worked with state Chambers of Commerce in North Carolina, Arkansas, Missouri and Kentucky to develop economic development plans and with another dozen regions, counties and organizations on strategic plans.

From 2008-2013, Ted was the Executive Director of the Southern Growth Policies Board, a 42-year old public policy think tank that provided economic development research, strategy and marketing advice, to states and communities across the South. Before coming to Southern Growth, Ted was a practicing economic developer for 28 years. Most recently, he served as Executive Vice President and COO for the Research Triangle Regional Partnership. During his eight years directing RTRP's operation he worked with hundreds of clients and helped generate 65,000 new jobs and almost \$10 billion in investment.

Ted's current projects include developing a new rural economic strategy for the North Carolina Chamber of Commerce, developing economic development plans for the 8 states that comprise the Mississippi Delta, creating new economic strategies in North Carolina for the Research Triangle Regional Partnership and the Piedmont Triad Partnership, conducting a national citizen input process on building community economic vitality, developing best practices in manufacturing and innovation for the U.S. Economic Development Administration and helping the Organization for International Investment create an economic development coalition to better attract foreign investment.

9. APPENDICES

In addition to the studies/plans listed in Section 3, the following documents are identified in the Appendices because they are key to strategic plan development.

#	APPENDIX	SOURCE
1.	Strategic Plan Capsule (Plan At-A-Glance)	Hayes Group Consulting
2.	Action Matrix	Hayes Group Consulting
3.	Business Development Opportunities in Moore County, NC	NC Dept. of Commerce
4.	Strategic Interviews (Summary Report)	Hayes Group Consulting
5.	County-Wide Strategic Web Survey (Summary Report)	Economic Leadership, LLC
6.	Healthcare/Medical Focus Group Summary	Partners In Progress office Hayes Group Consulting
7.	Defense/Military Focus Group Summary	Partners In Progress office Hayes Group Consulting
8.	Golf Focus Group Summary	Partners In Progress office Hayes Group Consulting
9.	Manufacturing Focus Group Summary	Partners In Progress office Hayes Group Consulting
10.	Manufacturing Situation Analysis	Partners In Progress office
11.	Rural Revitalization & Business Enterprise Focus Group Summary	Partners In Progress office Hayes Group Consulting
12.	Agribusiness Transcripts	Hayes Group Consulting
13.	Rural Tourism Focus Group Summary	Partners In Progress office Hayes Group Consulting
14.	Rural (N. Moore) Tourism slides	Convention Visitors Bureau