CONTEXT

The Piedmont Triad region consists of twelve counties in north-central North Carolina, including:

- Alamance
- Caswell
- Davidson
- Davie
- Forsyth
- Guilford
- Montgomery
- Randolph
- Rockingham
- Stokes
- Surry
- Yadkin

The region lies on the Piedmont Plateau of the Southeastern United States and stretches from the foothills of the Appalachian Mountain range to the sandhills of the coastal plain, covering 5,868 square miles. The Piedmont Triad’s land area consists of 53% forest cover, 24% agriculture or pasture, and 14% developed (NLCD, 2006).

The Piedmont Triad region lies at the heart of North Carolina’s ‘urban crescent’, connecting the state’s major population centers of Charlotte and Raleigh. The region has 68 municipalities, including the three principal cities of Greensboro, High Point and Winston-Salem. As a Combined Statistical Area the Piedmont Triad region ranks 31st in population nationwide (US Census Bureau, 2011).

“Times and conditions change so rapidly that we must keep our aim constantly focused on the future.”

- Walt Disney

PREVIOUS ECONOMIC DEVELOPMENT PLANNING EFFORTS

Planning initiatives related to the local and regional economy have been undertaken at differing geographies across the region for many years. Previous plans have encompassed individual counties, congressional districts, and the 12-county economic partnership area. Some plans have focused on specific subject matter, while others have been more general in nature. Each plan brought together subject matter experts, business interests, local officials and the wider community to develop potential solutions to the economic challenges facing the Piedmont Triad.
EXISTING PLANS

REGIONAL PLANS
Regional Vision Plan, Piedmont Triad Region, NC  2005

SUB-REGIONAL PLANS
Assessing the Economic Competitiveness of the Danville, Virginia Region (includes Caswell County) 2009
Northwest North Carolina Comprehensive Economic Development Strategy 2004
8th Congressional District Comprehensive Economic Development Strategy 2003

JURISDICTIONAL PLANS
Rockingham County Competitive Assessment 2011
Randolph County Competitive Assessment and Target Industry Study 2010
Montgomery County Economic Development Strategic Plan (21st Century Communities) 2006
Caswell County Economic Development Strategic Plan (21st Century Communities) 2005
Marketing Plan for High Point, North Carolina 2003

SUBJECT PLANS
Regional Profiles of Broadband Utilization in North Carolina 2011
Seven Portals Study, Piedmont Triad Region 2011
Economic Impact Analysis of an Auto Assembly Plant in the Piedmont Triad 2011
Economic Impact Analysis of the Piedmont Triad International Airport 2011
Airport Master Plan Update and Strategic Long-Range Visioning Plan – PTIA 2010
Hanging Rock Corridor Committee Report 2010

SYNTHESIS
Analysis of the collected planning documents was performed using the prescribed focus areas of NC Tomorrow. Plans were reviewed to identify challenges and strengths within each focus areas and potential solutions (Figures2-4).

COMPETITIVE ADVANTAGE & LEVERAGE
This focus area describes the sectors of the Piedmont Triad’s regional economy which are vital to our economic mix, are growing or emerging, and/or unique to the region.

REGIONAL INFRASTRUCTURE
This focus area includes the fixed assets of the region, including transportation, utilities, support systems and the natural environment.

VIBRANT COMMUNITIES
This focus area refers to the characteristics that create communities with a high quality of life, including local leadership, housing stock, and community amenities.

TALENT
This area focuses on the human assets of the region, including our workforce, education and healthcare systems and access to capital.
### Figure 2. Identified Strengths

#### Competitive Advantage & Leverage
- Scenic beauty
- Strategic location in the southeast and eastern seaboard
- Abundant resources
- 2/3 of the US population lies within a one-day drive
- Federal Express Mid-Atlantic Hub
- High quality business parks
- Low labor and land costs
- Goods-production in the region is more intense than NC and US as a whole
- Cooperative relationships between local government and business community
- Leadership in public and private sector
- Diversifying industrial base
- Agricultural potential
- Continued population growth
- Presence of existing industrial sites prime for redevelopment

#### Regional Infrastructure
- Transportation infrastructure
- Interstate access
- Piedmont Triad International Airport (PTIA)
- Brownfield redevelopment opportunities
- Above average usage of broadband in information, education, retail, professional services, leisure and hospitality sectors
- Available land
- Telecommunications infrastructure
- Growing cargo shipments at PTIA
- Availability of rail service

#### Vibrant Communities
- Low cost of living
- Cultural heritage
- Diversity
- ‘Home Place’ migration trends
- Institutional capital (local governments and community organizations)
- Growing support for local foods
- Cultural capital (leisure, arts and entertainment organizations)
- Institutional capital (local government and community organizations)
- Faith community
- Pro-business climate
- Rich history, sense of place
- Wide commitment to address economic issues

#### Talent
- Wealth of public and private colleges & universities
- Elasticity in local, available workforce
- Work ethic of the labor force
- Access to quality healthcare services
### Figure 3. Identified Challenges

#### Competitive Advantage & Leverage
- Regional identity and branding
- Regional collaboration and cooperation
- Development of a shared vision
- Building a culture of entrepreneurship
- Regional communication
- Economic transition away from manufacturing
- Continued reliance on traditional industry sectors
- Reliance on external funding
- Competition from across state lines
- Competition among regional jurisdictions
- Working together as a single economic unit or entity
- Ready to go industrial sites

#### Regional Infrastructure
- Solid waste issues
- Water quality, quantity and distribution
- Public transportation
- Limited ‘visitor ready’ tourism assets
- Broadband and cellular coverage
- Below average usage of broadband usage in construction, transportation and real estate sectors
- Watershed restrictions impact on growth
- Declining passenger boardings at PTIA
- Growth restrictions
- Insufficient truck routes serving entire region

#### Vibrant Communities
- Coordination of land planning
- Air Quality
- Changing demographics & increasing diversity
- Preserving and creating green space
- Strengthening central business districts
- Affordable housing
- Pessimism
- Contentious relationships among institutional organizations
- Public health
- Brain drain
- Aging population
- Crime, perception of crime
- Racial tensions
- Inconsistent land development planning and zoning policies
- Surface water quality
- Regional inconsistencies in population growth and loss

#### Talent
- Shrinking labor force and low participation rates
- Illiteracy
- Educational attainment at all levels
- Leadership drain
- Unemployment and underemployment
- Population is older, less affluent than NC as a whole
- Disconnect between transitioning workforce and training services
- Loss of workforce to other areas due to layoffs
- Persistent public health issues – Teen pregnancy, obesity
- Funding cuts impacting education
- Stagnant income levels
## Competitive Advantage & Leverage

- Create a leadership framework to align goals, build trust and maximize cooperation within the region
- Create regional structures to promote cooperation and sharing of resources
- Develop a positive regional identity and brand
- Develop regional media outlets
- Build diverse regional leadership capacity
- Focus support on small and medium enterprises (1-50 emp)
- Conduct site assessment for new class A industrial parks
- Nurture the elder care economy
- Promote the region internationally, nationally, statewide and locally
- Provide internet resources identifying incentives, demographics and available sites
- Promote the cultural, historic and scenic assets of the region
- Provide resources to retain and grow existing businesses
- Develop and support Piedmont Triad Research Park
- Develop advanced research and technology center
- Establish a regional design collaborative

## Regional Infrastructure

- Develop regional transportation plans accommodating alternative modes of transportation
- Improve cellular and high speed internet access
- Develop plans to address solid waste disposal
- Insure adequate water supply and water quality
- Develop local and regional trails
- Target broadband improvements to high growth opportunity industries
- Establish regional priorities for broadband
- Improve tele-health service availability
- Identify new locations for business parks
- Expand Piedmont Triad International Airport
- Complete interstate improvements on I-73/74 Corridor
- Complete the promised Transportation Trust Fund improvements on NC and US highways in the region
- Complete the Urban Loops
- Create an on-line regional implementation tool

## Vibrant Communities

- Develop and expand target business clusters:
  - Healthcare
  - Logistics
  - Wholesale Trade
  - Advanced Manufacturing
  - Finance & Insurance
  - Food Processing
  - Arts
  - Tourism
- Expand art, cultural, recreational and entertainment offerings
- Attract and retain young people
- Improve air quality without hampering economic growth
- Coordinate land use, green space and transportation plans
- Develop nature-based tourism assets
- Develop agri-tourism assets
- Develop training and resources to improve internet usage and skills to older adults and lower income households
- Encourage and incentivize downtown development
- Promote and preserve agricultural potential
- Grow virtual farmers market initiatives
- Invest in civic entrepreneurship to solve pressing problems together
- Complete regional brownfields assessment

## Talent

- Improve student performance and local schools K-12
- Increase educational attainment
- Encourage community participation in schools, develop adopt-a-school program region-wide
- Invest in student apprenticeship programs
- Improve access to quality child care & pre-K education
- Provide retraining for displaced workers
- Capitalize on college and university research and collaboration
- Strengthen relationships between training outlets and businesses
- Create an environment that supports entrepreneurship
- Targeted workforce training in priority industry sectors
- Support development of home-based businesses
- Re-engineer education systems to equip workforce with skills necessary to compete in global economy
- Create and support local entrepreneurial culture; focus support for transitioning workforce
- Increase resources for educational programs, teachers and educational facilities
- Establish a regional grants team
- Promote ESL classes for children and adults
VISION STATEMENTS

Key words and phrases from the vision statements found within the reviewed plans have been assembled below highlighting the breadth and depth of the visions identified through previous planning efforts.

Figure 5. Vision Statement Key Words