

# Heart of Texas Economic Development Strategy

## Comprehensive Economic Development Strategy 2013 - 2018

This is a planning document that assesses current conditions and trends, identifies potential for positive and negative change, and proposes strategies for achieving economic development and regional sustainability. This document was prepared by the Heart of Texas Economic Development District for the Region including Bosque, Falls, Freestone, Hill, Limestone, and McLennan Counties, Texas, and was approved January 22, 2014.

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## Executive Summary

The Heart of Texas Region is heavily agricultural, with a strong industrial and commercial center in the Waco MSA and smaller industrial and commercial centers in Hillsboro and Mexia. Access to health care is generally good throughout the region, with two major health centers in McLennan County and rural health centers in each of the other counties.

Freestone County: Economically stable but heavily concentrated in oil and gas; preparing for growth

- Demographics
  - o Majority Anglo, some African-American, few Hispanic
  - o Relatively evenly spaced in age
  - o Forecast is moderate growth, but we believe will exceed predictions
- Sources of economic growth: I-45, oil and gas, high median wage
- Sources of economic challenge: non-diversified economy, no population centers, Teague economically depressed
- Need: industrial development, housing, next-level projects, water supply, airport

McLennan, Limestone and Hill Counties: Economically stable and reasonably diversified but significant poverty

- Demographics
  - o Plurality of ethnicities with Anglo largest, followed by Hispanic and African-American
  - o U-shaped age distribution, with more older and younger
  - o Forecast is slow growth, but we believe will exceed predictions
- Sources of economic growth:
  - o Sizeable cities (Waco, Hillsboro and Mexia) with industrial and retail sectors
  - o Tourism and weekend-home economies from lakes
  - o Proximity to DFW Metroplex
  - o Good infrastructure
  - o Adequate water supply
  - o Waco is growing, with nearly \$1B invested in downtown in 10 years
- Sources of economic challenge: post-agricultural economy with relatively low-skilled workforce and low median wage
- Need: workforce development, community development, economic analysis, catalyst projects

Falls County: Economically challenged with opportunities for development

- Demographics
  - o Plurality of ethnicities with Hispanic largest, followed by Anglo and African-American
  - o U-shaped age distribution, with more older and younger
  - o Forecast is population loss, but we believe slow growth will occur
- Challenges of Hill and Limestone Counties without existing growth drivers; highest poverty rate; decaying infrastructure
- Needs: blight remediation, workforce development, infrastructure

Bosque County: Economically stable and concentrated in tourism and agriculture; in need of industrial development

- Demographics
  - o Mostly Anglo, some Hispanic, few African-American
  - o Older
  - o Forecast is slow growth, but we believe will greatly exceed predictions
- Sources of economic growth:
  - o Tourism and weekend-home economies from beautiful scenery
  - o Arts community and wineries
  - o Proximity to DFW Metroplex
  - o High median wage
  - o Strong local small business climate
- Sources of economic challenge
  - o Low industrial base, no population centers
- Needs: housing, workforce development, infrastructure, water supply, transportation enhancements, improved internet access

The Heart of Texas Economic Development District's strategy for regional economic development hinges work toward achieving four primary goals:

1. Build on Strong and Growing Clusters
2. Increase Workforce Skill
3. Increase Innovation and Entrepreneurship in the Heart of Texas
4. Develop New Data and Strategies to Address Current Poverty, Future Needs

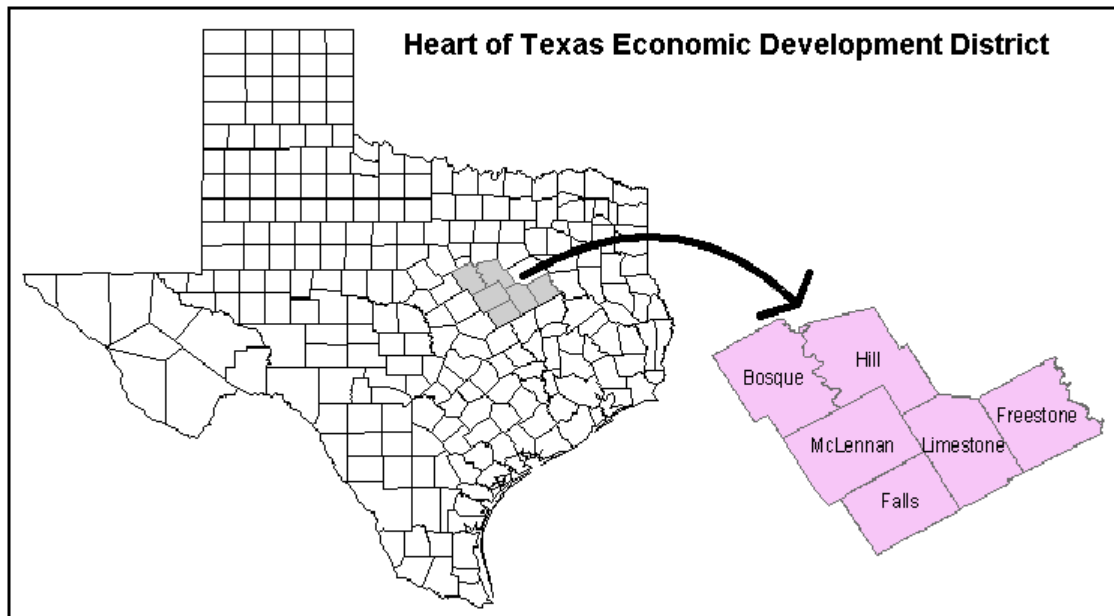
These initiatives are targeted to increasing the fertility of the region's economic development environment, so that new businesses are more likely to take root; existing businesses are more likely to thrive, expand, and multiply; and transplant businesses are more likely to locate and prosper here.

## Regional Analysis

### Background

The Heart of Texas Economic Development District consists of Bosque, Falls, Freestone, Hill, Limestone and McLennan counties. Located in central Texas equidistant from Dallas and Austin, the Heart of Texas region has a population of 354,624 (according to the 2013 American Community Survey 1-year data). The region covers 5,549 square miles and has a population density of 62.94 residents per square mile, compared to a statewide density of 93.54.

**Map 1: Heart of Texas Region**



### Regional Economy

The region's economy is largely driven by that of the Waco MSA, which includes the whole of McLennan County. Waco's economy is characterized by persistent high poverty. As the employment center of the region, Waco's low wages and underemployment play a large part in keeping regional incomes low as well. Freestone County, the region's county furthest from Waco, which also has the lowest travel share into and out of Waco, is also the county with the highest median per capita income due to the higher skill level of its workforce and the presence of oil and natural gas. The evolving Heart of Texas Regional economy is one of paradox: while high poverty persists, the regional economy is improving. Based on the overall positive performance of the Texas economy over the past 5 years, it is not unexpected that any region within the state would be outperforming the nation. However, it is significant that, according to the 2013 American Community Survey 1-year data, the Waco MSA is outpacing both the state and the nation:

- Waco MSA per capita income of \$21,836 5.26% increase (3 year period)
- Texas per capita income \$26,327 3.26% increase (3 year period)
- USA per capita income \$28,184 1.23% increase (3 year period)

Economic development strategies must continue to evolve so that all citizens benefit from and participate in the improving economy.

Additionally, the Heart of Texas region is faring well in terms of employment. Unemployment has dropped significantly over the past two years. Analysis of 2013 unemployment is included for purposes of comparison between counties: The 2013 regional unemployment rate was 6.46% compared to the State of Texas' rate of 6.2%--marked improvement. The gap between regional and state unemployment had been as wide as 2.5% less than 4 years ago. Looking at 2013: McLennan County's unemployment rate was 6.1%. Freestone and Limestone Counties had the lowest unemployment rates: 5.5% and 6.0%, respectively. Bosque and Hill Counties each had higher than the state's level, with 6.6% and 6.3%, respectively. Falls County had the highest unemployment rate in the region with 8.3%.

Falls County's unemployment rate of nearly 8.3% applies to a workforce that is itself only slightly more than a third of the population. In Falls County's economy there are two non-workers for every worker; in Freestone County there is one worker for every non-worker; the other counties have between 1.14 (Limestone) and 1.38 (Bosque) non-workers per worker.

Freestone County: Economically stable but heavily concentrated in oil and gas; preparing for growth

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  - Strong local small business climate
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The State of Texas economic development priorities center around identified industry clusters, and the Heart of Texas region contains some of the key clusters identified in the Texas Industry Cluster Initiative. Advanced tech/manufacturing, aerospace/avionics, and energy are all great fits for the Heart of Texas, and cluster analysis and targeted recruitment/retention efforts inform economic development strategies throughout the region, as well as this CEDS. The region's economic development plans are therefore in line with those of the State of Texas.

## Population

The region's population grew from 321,536 in 2000 to 354,624 in 2013 – a rate of growth of approximately .71% per year. The moderate growth contributes to economic vitality

without placing excessive demands on existing infrastructure. As a result, the region can easily accommodate more growth, and at a higher rate, in the coming years.

The Heart of Texas Economic Development District is concerned that projected growth, particularly in the five rural counties, may not capture the likely outmigration from major metro areas into the HOT Region. Comparisons of previous projected-vs.-actual growth for similarly situated counties show growth that exceeded projections by large amounts – in some cases by several hundred percent. The dependence on these numbers over very long time periods for very important issues – such as water supply – creates great incentive to review them in more detail, and the region is engaged in that work now.

For the most part, Heart of Texas counties with higher population densities had higher rates of population growth, and counties with lower population densities had lower rates of growth. This pattern is consistent with statewide trends and is likely to pose a challenge for sparsely-populated counties working to maintain quality of life.

There are two notable exceptions to this trend. Freestone County has the second-lowest population density, but it enjoyed the highest rate of population growth in the region from 2000 to 2010 – 11%. Falls County’s population density falls in the middle at around 22 people per square mile, but its population declined by 3%. It may be no coincidence that these outliers also differ from the rest of the region economically.

## **Geography**

The geography of the Heart of Texas Region is a combination of tablelands and irregular plains ranging to hilly in the west, with altitudes varying from 209 to 1,200 feet above sea level. The mean minimum temperature is 33.3 Fahrenheit and the mean maximum temperature ranges from 95.90 degrees Fahrenheit. Rainfall averages about 36.21 inches a year. This area has abundant lakes, rivers and streams that are popular for recreation and help provide municipal water supplies.

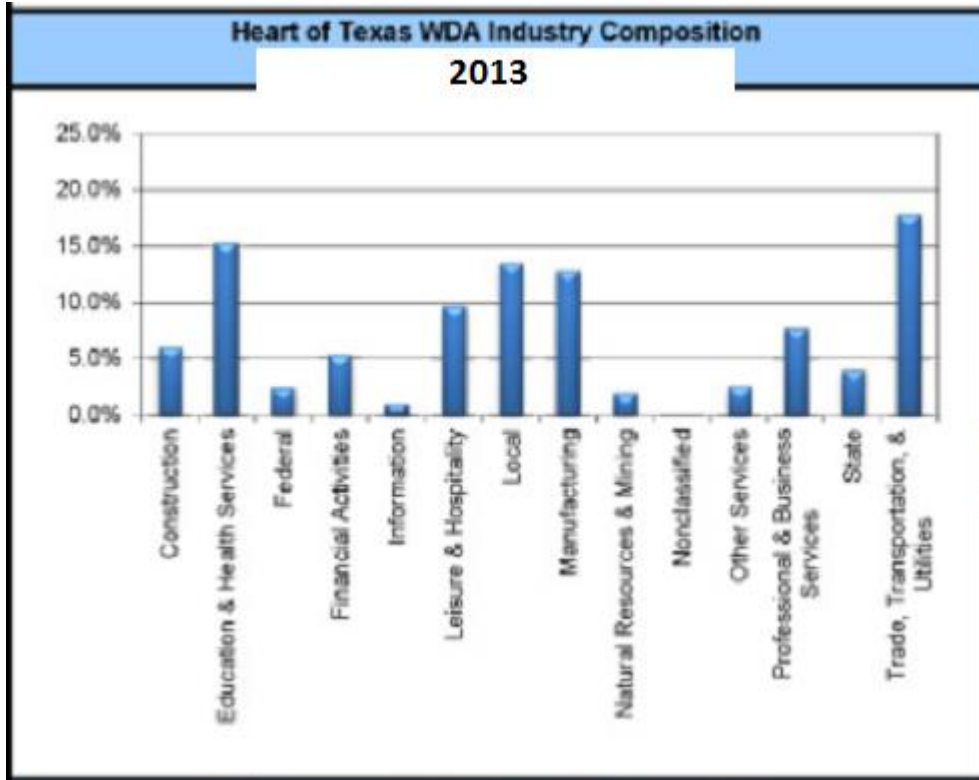
Lignite coal, found in Limestone and Freestone counties, is the most significant mineral resource in the area. Also significant is a large oil and natural gas field in the same area, and natural gas wells are already numerous and expected to grow in number. Other natural resources are stone, sand, gravel, and limestone.

## **Workforce Development and Use**

According to the Heart of Texas Workforce Solutions, the 2013 Civilian Labor Force for the Heart of Texas region was 170,184. The Civilian Labor Force for Texas decreased to 12,780,824. Both Texas and the Heart of Texas region saw an increase in the Civilian Labor Force by 207, 968 and 977 individuals, respectively.



**Occupations:** The best source of occupational information for the HOT Region is **the Economic Industry Profile for the Heart of Texas Workforce Development Area for 2013 provided by the Heart of Texas Workforce Solutions Board.** The total number of persons 16 years or older who were employed in the Heart of Texas during 2013 was 159,559.



There is a particular need in the region for occupations requiring skills training. The highest-demand occupations in the region requiring such training and the average starting hourly wages associated with those occupations are as follows:

1. Registered Nurse – \$24
2. Licensed Vocational Nurse – \$18
3. Auto Tech/Mechanic – \$16
4. Nurse Aide/Medication Asst. – \$9
5. Radiology Tech – \$20
6. Diesel Mechanic – \$18
7. Computer Support – \$18
8. Welder – \$14
9. Medical Lab/Tech – \$14
10. Legal Secretary/Paralegal – \$17

**Class of Worker:** Another way to view the types of workers in an area's labor force is by class of worker. According to the 2000 Census, the area had 40,494 employees who were

private wage and salary workers representing 70.6 percent of all workers. The region had another 10,550 persons who were government workers or 18.4 percent, 6,012 who were self-employed workers or 10.5 percent and 323 who were unpaid family workers representing 0.6 percent. This compares to the Texas statewide distribution of 78.0 percent for private wage and salary workers, 14.6 percent for government workers, 7.1 percent for self-employed workers, and 0.3 percent for unpaid family workers.

**Unemployment:** According to unemployment figures for April 2012, the Heart of Texas had an unemployment estimate of 10,488 persons which represents a rate of 6.2 compared to a Texas statewide unemployment rate of 6.5 for the same month. For the prior year, the rate was significantly higher, with a March 2011 unemployment rate of 7.5 percent.

**Reporting Establishments:** The Texas Workforce Commission indicates 6,364 business reporting units (those who report employment for Unemployment Insurance) operating in the Heart of Texas in the first quarter of 2008, with an average of 20.78 workers per unit. Average firm size makes a difference for job hunting and job development strategy because larger firms tend to have better defined ports of entry and in-house training capabilities. Although definitions vary greatly, small business can be defined as less than 50 workers and medium sized as 250 or less. The Texas average is 22.86 workers per unit.

**Commuting to Work:** Commuting to work for workers 16 years and over has a number of implications for transportation and municipal services. The Heart of Texas had a total of 43,311 or 76.8 percent who drove their car to work alone, 9,428 or 16.7 percent who car-pooled, 103 or 0.2 percent used public transportation, 1,192 or 2.1 percent who walked to work, 715 or 1.3 percent of regional workers who used other means to work, and 1,659 or 2.9 percent who worked at home. These methods of commuting to work compare to the Texas statewide results by: car alone (77.7%), car pool (14.5%), public transportation (1.9%), walked (1.9%), other means (1.3%), and worked at home (2.8%).

**Employers by Employee Size Class:** Employer contact information and employee size ranges are collected and updated by the Analyst Resource Center from InfoUSA Inc. The most current release is a product called the Employer Database 2010 1st Edition. This product shows that the area had approximately 2,787 establishments which employed 10 or more employees. Of these employers, approximately 0.3 percent employed over 1000 employees. 0.5 percent employed between approximately 500 and 999 employees, 7.7 percent employed between approximately 100 and 499 employees, 12.7 percent employed between 50 and 99 employees, 33.3 percent employed between 20 and 49 employees, and 45.5 percent employed between approximately 10 and 19 employees. Below are the top ten manufacturers found in the Heart of Texas.

**Top 10 Manufacturers for the Region**

- **Central Texas Corrugated Lp**
- **Central Texas Iron Works**
- **Fleetwood Homes**
- **Frazier & Frazier Industries**

- **Knife River Corp**
- **L-3 Integrated Systems**
- **O-i**
- **Packaging Corp Of America**
- **Time Manufacturing Co**
- **M&M Mars**

### **Transportation Access**

Transportation access continues to be a major focus in the region. The EDD and regional partners have participated in an initiative aimed at helping develop high-speed rail access to the area, which would link the region with the state's three largest metropolitan areas.

A program called "Link" has been operating for the past three years. This program connects residents of rural Falls County and south-eastern McLennan County to the urbanized transit service in Waco for employment and educational opportunities.

The Limestone County airport has just completed a significant expansion. The lighted runway is now 80 feet wide and 5,002 feet in length. This provides insured lands of most business class jets. Additionally, the airport boasts a new terminal and A/P service center.

### **Resources**

Area resources continue to grow and strengthen, and developing partnerships are helping to ensure that each agency's portfolio of solutions is made as available as possible through strategy and cross-promotion.

#### **Economic Development Resources**

1. The Greater Waco Chamber of Commerce serves as the lead economic development agency for Waco and McLennan County; it is soon to conduct a new data-driven economic development strategy that will guide its recruitment and retention efforts.
2. Local professional economic developers are located in Hillsboro, Fairfield, Teague, Groesbeck, Meridian, Clifton, McGregor, and Mexia.
3. The two Small Business Development Centers serving the region – whose main offices are in Waco and Corsicana – have been recognized for excellence and are expanding their presences in the rural counties. New SBDC offices are opening in Limestone and Freestone Counties.
4. Industrial park expansions are complete or underway in Fairfield, Groesbeck, Hillsboro, and Mexia.
5. Thanks to a grant from the Austin Regional Office of EDA, the City of Waco engaged the W.E. Upjohn Institute for Unemployment Research to create a new economic development plan for the city. According to the Upjohn

researchers, this plan constitutes a new approach and has the potential to shed new light on economic development approaches to remediate generational poverty, a condition that stifles economic growth in the entire region but particularly in the counties of Falls, Hill, Limestone and McLennan. The Plan was adopted by the City of Waco in the Summer of 2014.

### **Economic Development Partnerships**

1. HOTEDD and McLennan County Small Business Development Center collaborate on service delivery to rural areas.
2. The Navarro College Small Business Development Center is operating business counseling sites in Limestone and Freestone Counties.
3. HOTEDD and the Sam Houston State University Center for Rural Studies (Huntsville, TX) are engaged in a number of projects. 2014 projects include rural economic development training for municipal staff and citizens. In 2015 work will begin on a joint project with Wilkes University of Pennsylvania, SHSU and HOTCOG on rural entrepreneurship capacity building and best practices; and the launch of an Intentional Start-Up Community (ISC's) Process in Freestone County.

### **Environment**

The Heart of Texas Region has shown significant advances in the realm of environmental awareness by its public and economic development agencies. Solid Waste reduction programs offered by the Heart of Texas Council of Governments have seen strong participation. Showcase LEED buildings have been constructed by the Greater Waco Chamber of Commerce and McLennan Community College that boast such features as recycled building materials and green roofs.

Waco's environment continues to be strong, with the continued attainment status of its air quality, its ongoing efforts to maintain its wetlands, and its plentiful supply of clean drinking water. Air quality, however, has grown as a local issue and will become an even greater priority, especially if the standard for ground-level ozone is lowered from the current level of 75 parts per billion.

Reviews of regional air quality and solid waste management are currently underway as part of the Efficient Towns & Counties regional planning efforts, funded by a Sustainable Communities regional planning grant. The results of these reviews are expected in mid-2015.

### **Water**

Water supply varies throughout the region, but overall there is an abundance of this important resource. Mexia, in particular, has an abundance of potable water due to the efforts of the Bistone Municipal Water District. Wells into the Cariso Wilcox aquifer coupled with the Lake Mexia reservoir contribute to a supply that exceeds projected demand.

A major review of regional water supply, infrastructure, and resiliency is currently underway as part of the Efficient Towns & Counties regional planning efforts, funded by a Sustainable Communities regional planning grant. The results of this review are expected in mid-2015.

### **Emergency Preparedness and Economic Resiliency**

Whether a purely economic disruption or a natural or man-made disaster, unexpected shocks can severely affect a local economy even after rebuilding is underway. As EDA’s boots on the ground, the Heart of Texas Economic Development District represents EDA as a community’s resource for Disaster Relief economic development planning and other assistance. In addition, the region provides an important backbone of communication and other resources in the event of trouble.

**Economic Disruption:** Economic Disruptions, whether due to closures, industry shocks, or larger-economy issues such as recession, inspire responses as follows:

1. The affected local jurisdiction(s) are always in charge.
2. Subject-matter experts form the second line of response, such as Workforce Solutions of the Heart of Texas holding job fairs, development of training programs for dislocated workers, etc.
3. HOTEDD supports with data, fundraising, technical assistance, and the brokering of supportive partnerships with outside agencies and regional partners such as other employers, real estate brokers, etc.

**Disaster Preparedness:** The Heart of Texas Council of Governments Emergency Preparedness team serves the Heart of Texas region with coordinated planning, drills, training, communication, and communications infrastructure. The Heart of Texas Emergency Preparedness Plan is jointly reviewed by the Economic Development District and is adopted as an appendix to this Economic Development Strategy.

As in the event of economic disruption, disasters create situations in which

1. The affected local jurisdiction is always in charge.
2. Subject-matter experts – in this case, emergency preparedness staff, response

*“When tragedy struck in West, HOTCOG’s emergency preparedness team was there to help – and later, HOTEDD staff navigated the sea of disaster funding to ensure we were able to recover economically as well as physically.”*

City of West, Texas Mayor  
Tommy Muska

- teams, and nonprofits or charities who can respond to victims – form the second wave.
3. HOTEDD moves quickly to support the local jurisdictions and elected officials with technical assistance, training, and the brokering of supportive partnerships with outside agencies and regional partners such as other employers, real estate brokers, etc.

## CEDS Goals and Objectives -- Defining Regional Expectations



### **Goal: Build on Strong and Growing Clusters**

#### Objectives

1. Expand Health Care Cluster
2. Expand Aerospace and Avionics Cluster
3. Expand Manufacturing Cluster
4. Expand Logistics Cluster

#### Projects, Programs, Activities

1. Expand Health Care Workforce

#### Development

2. Continue Aviation Alliance
3. Enhance Technical Training
4. Recruit and Retain companies

#### Performance Measures

1. Number of Jobs, Number of Firms

### **Goal: Increase Workforce Skill**

#### Objectives

1. Retain Talent
2. Increase Opportunity for Underskilled / Underemployed Adults
3. Boost Skills Delivery in K-12
4. Create New Partnerships with, within, and among Post-Secondary Schools
5. Partner with Employers on All Strategies

#### Projects, Programs, and Activities

1. Increase Enrollment at Waco Advanced Manufacturing Academy, Particularly Among Students from Falls, Hill and Limestone Counties
2. Baylor Research and Innovation Collaborative
3. Small Business Development Center Partnerships
4. Projects Recommended in Upjohn Study (see below)

#### Performance Measures

1. Educational Attainment by Age in Each County
2. Median Income
3. Graduation Rates
4. Workforce Participation and Unemployment Rates

### **Goal: Increase Innovation and Entrepreneurship in the Heart of Texas**

#### Objectives

1. Provide Resources to Regional Communities for Entrepreneurs and Small Businesses
2. Use innovative planning approaches
3. Increase Businesses' Access to Capital

#### Projects, Programs, and Activities

1. Operate Revolving Loan Fund
2. Hold Entrepreneurship Summit
3. Conduct Regional Innovation Development Work
4. Provide Individual Community Planning Services

#### Performance Measures

1. Percentage of Regional Population Reporting as Self-Employed
2. Business Starts
3. Loan Portfolio: Direct Businesses Affected, Jobs Created/Retained
4. Number of Individuals Trained
5. Number of Communities Hosting Events

**Goal: Develop New Data and Strategies to Address Current Poverty, Future Needs**

1. Grow a Backbone of Data / Technical Support for Local Jurisdictions and the Region
2. Conduct Rigorous, Data-Driven Local Economic Development Plans to Drive Local Investments of Time, Space, and Incentives
3. Brand and Market the Region
4. Conduct Review of Population Projections for Rural Counties
5. Complete Efficient Towns & Counties Regional Sustainability Work
  - a. Community Development
  - b. Environmental Development
  - c. Emergency Preparedness
  - d. Economic Development
  - e. Next-Generation Plans, i.e. Water Supply Studies, Intergovernmental Partnerships
6. Complete Waco’s Economic Development Strategic Plan and Tie its Results to Regional Efforts
7. Study the Network of Veterans’ Support Services as Well as Veterans’ Impact to Regional Economy

*One of the more exciting elements for us... was the fact that Waco was interested in doing economic development in terms of helping economically disadvantaged individuals get on the pathway to employment. That’s an issue that almost every community faces, but...it’s just kind of hoped that some economic good created will trickle down if the economic development is strong enough. But in this project, it was straightforward from the start: How can we grow economic opportunities in Waco for individuals of low and middle income? That’s what excited us. A lot of our activity can be funded internally, (so we can afford to) really focus on what we think is interesting. And we think this is interesting.*

- George A. Erickcek, W.E. Upjohn Center for Unemployment Research

**Projects, Programs, and Activities**

1. Complete Upjohn Work
2. Perform Study of Veterans as Supply and Demand Drivers of Skills and Services
3. Complete Sustainable Communities Plan
4. Complete GIS Mapping of Regional Water and Sewer Systems
5. Develop and Distribute Transfer of Wealth Data and Community Asset-Building Strategies
6. Move into Implementation Planning
  - a. Water Supply
  - b. Infrastructure Maintenance
  - c. Regional and/or Intergovernmental Partnerships
  - d. Alignment of CDBG Investment
7. Implement Plans Listed Above

**Performance Measures**

1. Menu of Technical Assistance Options



2. Data Available to Region
3. GIS Layers
4. Number of Communities Adopting Features of Sustainable Communities Plan
5. Number of Next-Generation Initiatives
6. Regional Median Income
7. Formation of Community Foundations

## Community and Private Sector Participation

Regular and ongoing private sector participation results from the makeup of the HOTEDD Board. Board members representing a broad array of private interests, including utility, real estate, banking, and others, ensuring that all discussions of policy and direction are made with the private sector's needs in mind.

In addition, the EDD staff is in constant communication with representatives of specific projects, many of which are specific private-sector businesses. Two examples are the Baylor Research and Innovation Collaborative and the regional Revolving Loan Fund. HOTEDD's ability to support both sophisticated, regional projects worth millions of dollars and small individual business growth in our rural communities is made possible by the constant, open communication between staff and local public and private-sector actors.



Community participation in the creation of the CEDS took place not only during formal EDD meetings, but also in telephone calls, via e-mail, and in one-on-one and group visits with stakeholders throughout the region. Individual, on-location meetings were held in Limestone County with Judge Daniel Burkeen and Economic Developers Tommy Tucker and Sharon Barnes; in Hill County with Judge Justin Lewis, Economic Developer Sandra Barner, and Community Developer Jerry Barker; in McLennan County with SBDC Director Belinda Pillow, Ashley Allison of the Waco Foundation, the seven-person Economic Development team of the Greater Waco Chamber, and Economic Developer Leo Connor; with Falls County Judge Steve Sharp; and with community developer Damaris Neelley of Bosque County. Distance discussions took place with Mayor Virginia DuPuy of Waco, Judge Cole Word of Bosque County, and economic developer Dave Zuber of Freestone County. In addition, a draft version of the Plan of Action was presented to 31 attendees of a training held for the region's newly-elected and reelected mayors and councilmembers. The network of stakeholders, economic developers and resource agencies is strengthening and has grown significantly in the process of CEDS development.

Officials in each county reviewed and contributed to this document prior to its approval.

a. **Other Resources**

**DATA TABLES**

See Appendix A, Data Tables

**ANALYSIS OF ECONOMIC DEVELOPMENT CHALLENGES AND OPPORTUNITIES:**

See Appendix B, Analysis