Agenda

- Introduction
- Project Overview
- Setting the Stage
- Discussion
Task Force

Please introduce yourself:

- Name
- Organization
- County in which you reside
Project Sponsors

WEST KENTUCKY WORKFORCE
BUILDING BUSINESS AND CAREERS FOR KENTUCKY

PADD

DEPARTMENT OF LABOR
UNITED STATES OF AMERICA

ECONOMIC DEVELOPMENT ADMINISTRATION
U.S. DEPARTMENT OF COMMERCE
Your Team

Amy Holloway, President
Chris Engle, Senior Consultant
Tony DeLisi, Project Consultant

Joel Simon, Vice President
Sarah Miller, Consultant
20+ U.S. States
80+ Regions
Europe
Mexico
CAEL’s Intermediary Role

- Employers and Unions
- Workforce Learning and Development
- Colleges and Universities
- Government and Community
- Higher Education
- Public Policy, Workforce Systems
CAEL Representative Engagements

Public Sector

Education

Corporate

- ArkansasWorks
- Triad Works
- Enterprise for Employment & Education
- Workforce Investment Board of Southeast Missouri
- California Partnership for the San Joaquin Valley
- Wired
- Rio Salado College ONLINE
- ACT
- Temple University
- Kentucky Community and Technical College System (KCTCS)
- WICHE (Western Interstate Commission for Higher Education)
- EPSilen
- workforceChicago
- Levi's
- Brunswick
- IBIO Institute
- Verizon

a avalanche
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Planning Our Future

Turbulent economic times currently challenge our nation and our state. The West Kentucky Workforce Investment Board (WKWIB) and Pennyrile Development District (PADD) are taking this time to ensure that our region is prepared for the future.

Thanks to support from the U.S. Department of Labor and Economic Development Administration, the WKWIB and PADD are engaging in a five-month process of identifying future economic development targets and aligning workforce programs around those businesses’ needs.

National consultants from Avalanche Consulting, Inc. and the Council for Adult and Experiential Learning (CAEL) are conducting a multi-faceted, in-depth evaluation of the region and crafting a strategic plan that will result in long-term growth and prosperity.

The process will answer critical questions such as: What characteristics of our region are competitive advantages? Where are gaps in our talent pipeline and how do we fill them? What specifically should the region do to expand and recruit companies in tomorrow’s high growth sectors?

Residents of the Pennyrile Region are invited to contribute their suggestions by taking a quick, 5-question survey:

Click here to take the Pennyrile Future survey.

As a result of this process, the nine-county Pennyrile region will be positioned for the next wave of economic growth and have the expertise, vision, and tools to succeed.
Project Survey

www.PennyrileFuture.com

Pennyville Future

1. Share Your Ideas

This brief, five question survey seeks your ideas about the Pennyville region. Your input will help craft a regional vision and a strategy for improving economic conditions.

The Pennyville region includes the following counties: Caldwell, Crittenden, Christian, Hopkins, Livingston, Lyon, Muhlenberg, Todd, and Trigg.

1. What makes the Pennyville region unique compared to other communities?

_____________________________________________________________________________________

2. What one city or region best represents where the Pennyville region wants to be 10 years from today?

_____________________________________________________________________________________

3. List three words that describe the Pennyville region's workforce.

_____________________________________________________________________________________

4. What, if anything, is holding the region back in terms of economic development?

_____________________________________________________________________________________

5. If you were "king" of the Pennyville region, what one action would you take to improve the future potential of the region?

_____________________________________________________________________________________
## Project Timeline

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Project Flow

Consulting Team

1.1 Project Setup

2.1 Economic Brief

Task 2.4: Workforce Conditions Analysis

Task 2.5: Evaluate the Education Infrastructure

Steering Committee

Kick-Off Meeting

Steering Committee Individual Interviews

Phase 1 Findings & Interactive Workshops

Community Outreach

Public Website Unveiled

2.2 Employer Interviews

2.3 Employer Survey

Trip 2: Research Findings (late June)
Project Flow

Consulting Team
- Task 3.1: Detailed Sector Analysis
- Task 3.2: Asset Analysis
- Task 3.4: Target Selection
- Task 3.5: Best Practices

Steering Committee
- Interactive Workshop on Emerging Sectors
- Phase 3 Findings Presentation

Community Outreach
- Task 3.3 Emerging Sectors Focus Groups

Trip 3: Targets / Emerging Sectors Findings (August)
Project Flow

Task 2.6: Report 1, Workforce Analysis: Strategies & Recommendations


Task 3.7: Regional Summit and Sub-region Implementation Workshops

Trip 4: Strategy Presentation (Aug/Sept)

Trip 5: Regional Summit (Sept/Oct)
Deliverables

Phase 1: Workforce Analysis

DElIVERABLES
• Economic Brief
• Workforce Conditions Report
• Employer Survey & Input Results
• Educational Infrastructure Evaluation
• Strategies & Recommendations

Phase 2: Emerging Sector Analysis & Plan

DElIVERABLES
• Sector Analysis and Opportunities
• Target Industry Assets / Challenges
• Target Selection
• Best Practices
• Strategies and Recommendations

• Regional Summit
Our Schedule This Week

- Familiarizing local leaders about the project
- Touring the region
- Getting an overview of economic and workforce conditions
- Conducting 10+ focus groups and numerous interviews
# Steering Committee Roles

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<th>Avalanche / CAEL</th>
<th>Steering Committee</th>
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- Discussion
Previous Studies

We have received and reviewed the following:

- Employment Assessment / Strategic Plan for Hopkinsville-Christian County (Market Street, 2010)
- Almost Nashville, KY Economic Development Strategy (Boyette, 2009)
- Labor Market Assessment for Fort Campbell Region (TIP, 2007)
- Pennyrile Region Comprehensive ED Strategy (PADD, 2008/9)
- Numerous other data reports and statewide studies
National Economy

Positives

• Economy in recovery, but will be a slow recovery
  • GDP has grown in the last 3 quarters
  • Employment growth not rebounding
  • Unemployment still around 10%
• Consumer confidence and spending has rebounded
• Stock market has bounced back
  • This is the only “V-shaped” recovery, not the economy
National Economy

Negatives

• Employment growth remains the biggest gap in the recovery
  • Same situation occurred in the last recession
  • Cost cutting measures will mean some jobs won’t come back
• Government debt + lower tax revenue = cutbacks
  • Local government and public education layoffs
  • Reduced budgets
• Housing recovery has been slow and very uneven across U.S.
  • An estimated 25% of mortgages are still “underwater”; 50-70% in hardest-hit states
• Concerns for double-dip are still prevalent
Local Economic Picture

Pre-recession, a majority of counties were growing at or above U.S. average (6%).


Some, but not all, rural counties are lagging.

Metro job growth turned positive in early 2010.
Demographic Changes

New population is heavily drawn to the larger counties and proximity to Ft. Campbell.

Large Hispanic and Asian population growth.

Did you know? The average age is falling. Child population is gaining.

PLUS: Per capita income is gaining on U.S.
Large percentage increases in mining and private education.

Good growth in software, professional svcs, distribution, restaurants.

Manufacturing growth found in wood products, metals/machining, food,
High growth anticipated nationally in Professional Services, Health Care, Trade, and Hospitality. Mfg expected to rebound.

How well is the Pennyrile region positioned to participate in this growth?
Take-Away for this Process

• Now is the time to start planning for post-recession
• Outlook for future will be much improved in 6-12 months
• Part of our research process will be to connect the data to “ground-level” realities and local perceptions.
• We will make use of past research studies and extend targets into niche sectors within established industries, emerging sectors, and new products and technologies
Previous SWOT Findings

**Strengths**
- Good highway infrastructure with good access to major markets
- Strong airport in neighboring Nashville; UPS hub in Louisville; Fedex in Memphis
- Located in a central geographic position to provide “just in time” delivery to auto plants in IN, KY, TN
- Availability of skilled, manufacturing workforce
- Good work ethic, affordable
- Two mega-sites in region

**Weaknesses**
- Below average levels of educational attainment in workforce
- Underperforming education system but improving
- Local occupational license tax
- Shrinking share of working age population due to influx of retirees and outflux of young professionals
- Lack of startup/venture capital
- Lack of entertainment options for young professionals
- Crime perceived to be high
# Targets Already Identified

<table>
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<tr>
<th>Industry</th>
<th>Developments</th>
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| Clean Energy Production, Mftg. | • Solar industry / Hemlock Semiconductor + suppliers  
                              • Convert coal into new products like syngas (proposed plant)  
                              • Expanded production of ethanol in region from corn |
| Distribution              | • Proposed I-69 (NAFTA Corridor between Mexico and Canada) and I-66 (east-west Transamerican corridor) within Pennyrile region               |
| Mining                    | • Growth in coal mining  
                              • Potential for new limestone quarries in Crittenden and Livingston counties                                                             |
| Bioagriculture            | • Crops, animal diagnostics, wood/forestry                                                                                                    |
| Adv. Manufacturing        | • Automotive suppliers, metal products, wood products                                                                                          |
| Tourism                   | • Land Between the Lakes, new hiking/biking trail projects, deer hunting, resort                                                              |
| Entrepreneurship          | • Software, Professional Services?                                                                                                            |
| Others???                 | ???                                                                                                                                         |
Expected Outcomes of Plan

• Highly detailed identification of industry opportunities
• Stronger marketing messages and tactics
• Establishment of target industry implementation teams
• Identify new talent development, retention, and transitioning strategies
  • Will also provide job seekers clear direction of occupational demand
• Creation of new entrepreneurship efforts
• Strong community buy-in for vision
• Establish collaborative network for the Plan’s implementation across workforce development, economic development, industry, and education.
• Identify new funding sources to implement specific tactics
• Unveiling of new Economic and Workforce Data Portal
Data Portal

In 2 months: Internal stakeholders will get access
End of study: Unveiling of portal publicly at Regional Summit
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Discussion

To respect time, please:

• Speak one at a time
• Listen actively
• Not criticize the views of others or attempt to persuade them
• “Pass” if not ready to respond to a question
• Keep comments focused and brief

In turn, we will not attach names or identifying information when we report focus group findings (unless specifically asked to do so).
What aspects of other regions across the U.S. do you aspire to be more like, and why?
Discussion

FILL IN THE BLANK...

In an ideal world, the Pennyrile region will accomplish _____________ by 2020.

What can the Pennyrile Region do to move toward this vision?
Discussion

Economic development blends:

- Business recruitment
- Local business expansion
- Entrepreneurship

What is the ideal % mix of future activities to ensure the Pennyrile Region achieves its long-term vision?
Discussion

How should collaboration across the region evolve to support economic growth?
Finally...

What is your **personal** or your **organization's** top priority/outcome for this planning process?
Thank you!

Project Kick-Off Presentation - May 2010

www.avalancheconsulting.com