

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY 2017-2021

CEDS

DEVELOPMENT DISTRICT OF CENTRAL TEXAS | 2180 North Main Street, Belton, Texas 76513

Approved by the EDA August 3, 2017

Development District of Central Texas

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The 2017-2021 Comprehensive Economic Development Strategy was adopted by the Development District of Central Texas Board of Directors on June 13, 2017.

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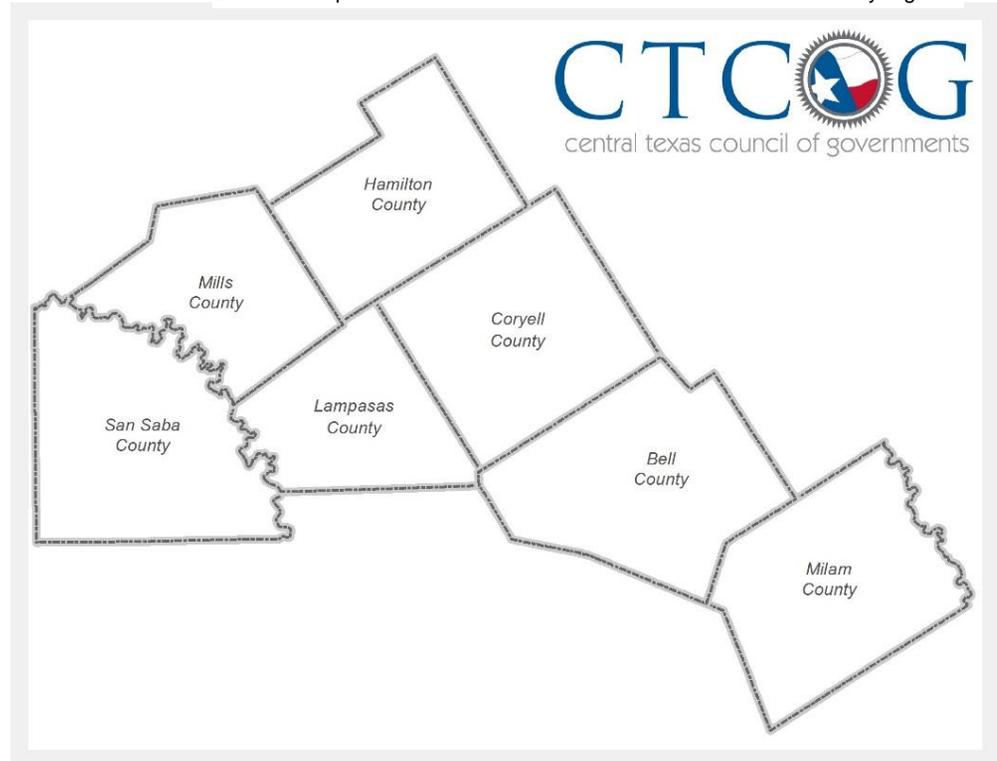
1. INTRODUCTION

The counties of Bell, Coryell, Hamilton, Lampasas, Milam, Mills, and San Saba comprise the Development District of Central Texas (DDCT). The DDCT serves the Central Texas Council of Governments (CTCOG) seven-county planning area providing economic development assistance to approximately 476,360 persons within a 6,559-square mile area. The DDCT was incorporated in the State of Texas as a non-profit corporation on June 24, 2002. A Board of Directors originally composed of 27 representatives from local governments, chambers of commerce, business, economic development organizations, and minority interests began this corporation. The Board of Directors acts as the Comprehensive Economic Development Strategy (CEDS) Committee for the District. [1]

The Economic Development Administration requires that each Economic Development District produce a CEDS every five years. This ensures that each district maintains an up-to-date strategy to establish economic goals, address challenges facing their respective region, and guide development priorities. The CEDS process drives districts to examine the region they serve, innovate new ways of supporting development in that region, and stipulate specific metrics for measuring success. Hence, the CEDS process, not just the final strategy document, is critical for districts.

The CTCOG provides the administrative and operational support for the DDCT. Initiated in 1967, the CTCOG has been consistently involved in program administration and development. Taking an aggressive and progressive approach to providing needed services to its members, the CTCOG has been an active member in the development of planning organizations.

Exhibit 1: Map of Central Texas Council of Governments' seven-county region.

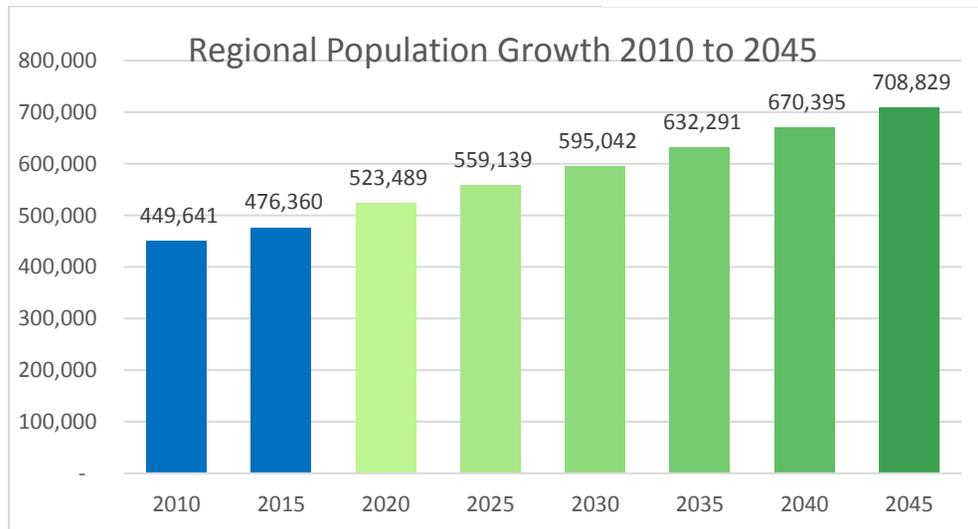


2. BACKGROUND SUMMARY

POPULATION GROWTH

The Texas Demographic Center reported a huge growth projection for Central Texas. The 7-county region has experienced significant population growth in Bell, Coryell, and Lampasas Counties in recent years, adding approximately 26,719 people to the Central Texas COG region between 2010 and 2016, from 449,641 to 476,360. Population projections for 2017 through 2045 show that the region will likely increase in population by approximately 229,755 by the end of year 2045, and population at that time could be over 700,000. [6]

Exhibit 2: Regional Population Growth



Source: Texas Demographic Center

The Central Texas Workforce Strategic Plan reported that “the Central Texas area has a population density of 68.08 residents per square mile compared to a statewide density of 95.92; it has one urban county with a population density of 285.14 residents per square mile and six rural counties with a combined population density of 25.27 residents per square mile”.

The fastest growing county in the CTCOG region is Bell County, with a population at the end of 2016 over 336,000 and at the end of 2045, it is projected to reach almost 525,000. In Exhibit 3 the graphs show growth in four out of seven most populous CTCOG counties, noting that the region’s general population is growing region in the State of Texas. [6]

Regional population growth has been consistent but below state averages with 21,910 net new residents entering the area at a pace of just under 1 percent per year between 2010 and 2015. The bulk of that growth has been in Bell county (57%), Coryell County (37%), Lampasas county (31%) and Milam County (21%). Three counties do not have significant growth going forward: Hamilton 1%, Mills 8%, and San Saba .03%. [1]

EXHIBIT 3: Population of CTCOG Region. Estimates are shown for 2014 and 2015, and Projections are shown for years 2016 – 2045.



Data provided by the Texas Demographic Center. Graphs illustrated by CTCOG Staff.

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JOBS AND EMPLOYMENT

The Central Texas regional economy had approximately 199,642 jobs in 2016 and grew at roughly six percent between 2013-2016, adding 12,067 new jobs, as reported by the Central Texas Workforce publication: *On the Move, Part 1*. As the largest single economic driver of the Central Texas economy, Fort Hood supports 66,492 people on-post, including 21,221 civilian employees and contractors. According to a July 2016 release by the Texas Comptroller's Office, Fort Hood is responsible for \$35.4 billion in Texas statewide economic activity and over 200,000 total jobs – a majority of which fall in Central Texas. Although these latest figures show a decline in jobs and economic impact from 2011 estimates, they are substantial none-the-less. As the largest Reserve training center in the Army, Fort Hood is estimated to economically touch 1 in 4 residents of Bell and Coryell counties in some manner. All manner of “population support industries” from areas from local school districts, to housing, retail trade, and leisure and hospitality owe some measure of activity from Fort Hood.

Even with moderate population growth, the housing industry has continued to be strong in the Central Texas region with the Heavy and Special Trade Construction sector adding 2,203 jobs between 2013 and 2016. [1].

Job tenure data does not show significant trends in job hopping behavior. However, there is a growing body of anecdotal evidence that younger workers are choosing to change jobs to achieve several career building objectives. With fewer defined pension plans, and portable healthcare through the Affordable Care Act., workers have fewer financial incentives to stay at the same job. Slower wage growth and smaller cost of living adjustments resulting from low inflation, means that many workers are relying on job movement to increase earnings. Job change also tends to lead to expanding one's network of contacts, creating greater opportunities for the future, and learning new skills while gaining knowledge and experience in different environments and cultures.

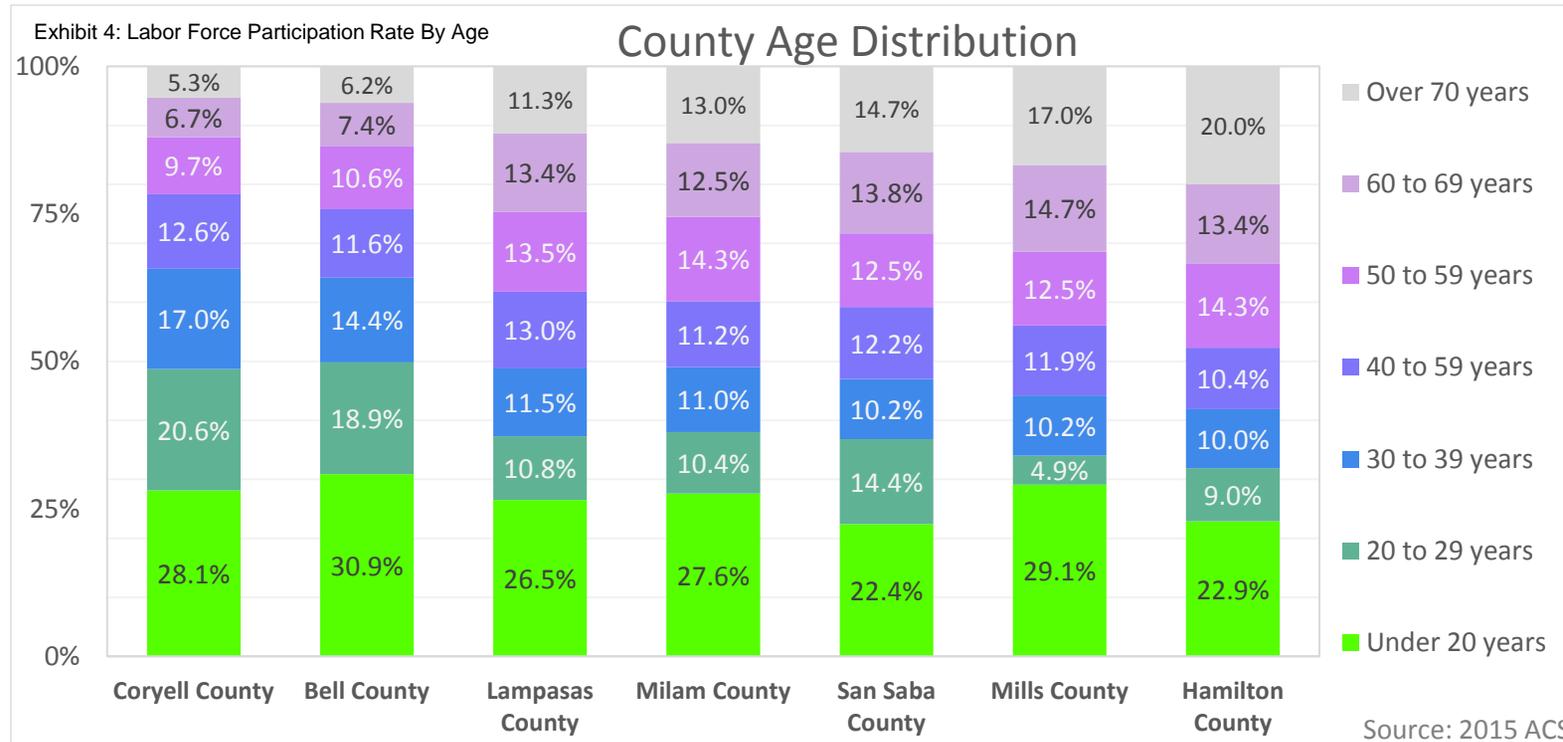
The labor market is increasingly difficult to navigate, even for those with resources. For those without education, financial means and workplace knowledge, building a career can seem impossible. The business community is also taking notice and many companies, fearful of labor and skill shortages due to retiring baby boomers, are rethinking how they attract younger workers, grow their potential, and organize work. [2]

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The labor force participation rate (LFPR) is a ratio — the population that is employed or actively searching for work as a share of the total civilian, non-institutional population aged 16 and older. Exhibit 4 graphs the labor force participation, as percentages by county per the 2015 American Community Survey (ACS) which is an ongoing survey that provides vital information on a yearly basis.

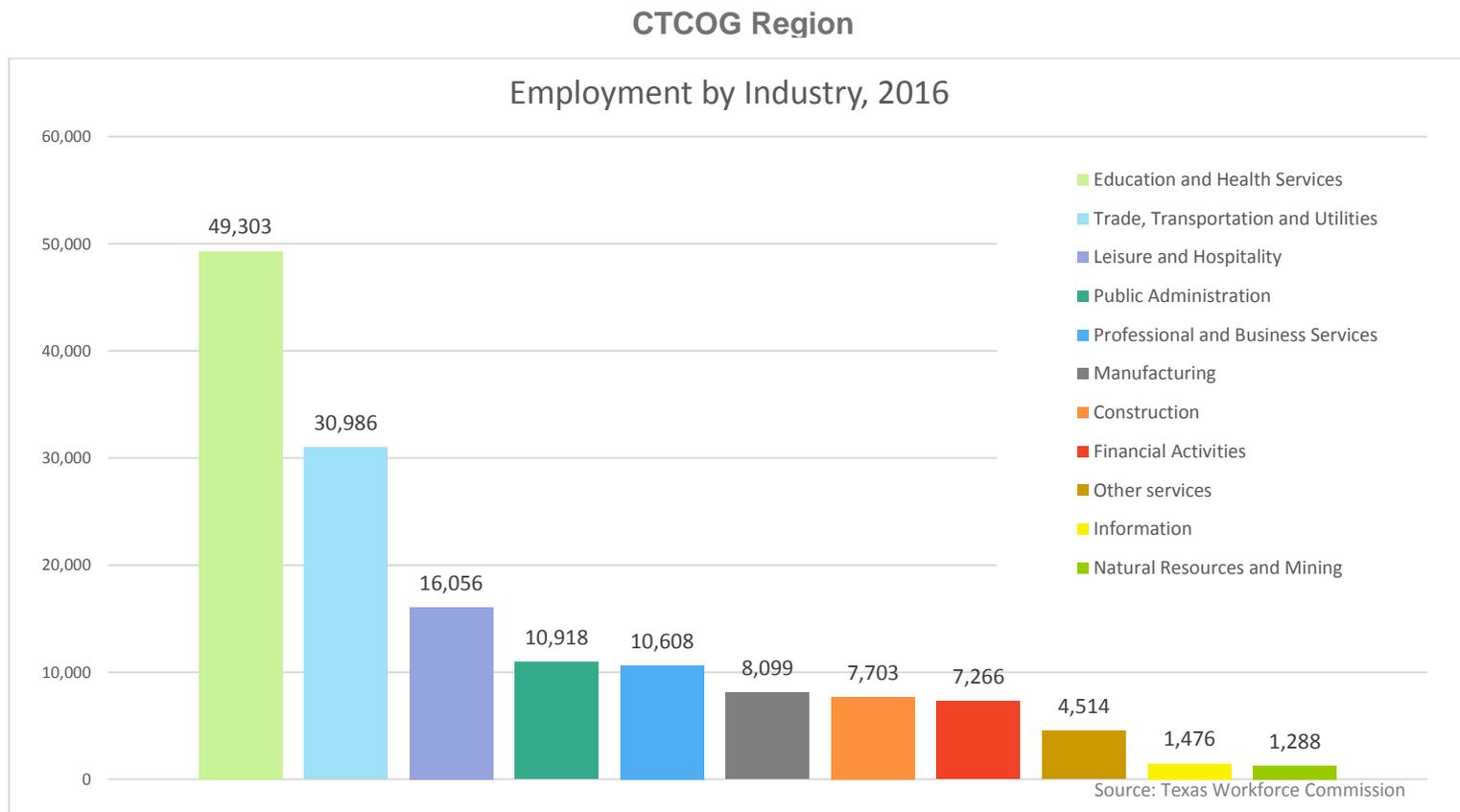


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During 2016, the Texas Total Nonfarm Employment added 218,800 jobs, which was a 1.8 percent annual growth rate, with eight of 11 industries showing growth. Education & Health Services showed the highest annual gain of 54,500 jobs, also the highest annual growth rate of 3.4%. Leisure & Hospitalities gained 41,000 jobs. Mining & Logging reported the largest annual loss of 14,200 jobs.

In comparison, the Central Texas Region shows in Exhibit 5 that Education and Health Services had the highest number of employment, with 49,303 jobs, followed by Trade, Transportation and Utilities which had 30,986 employment.

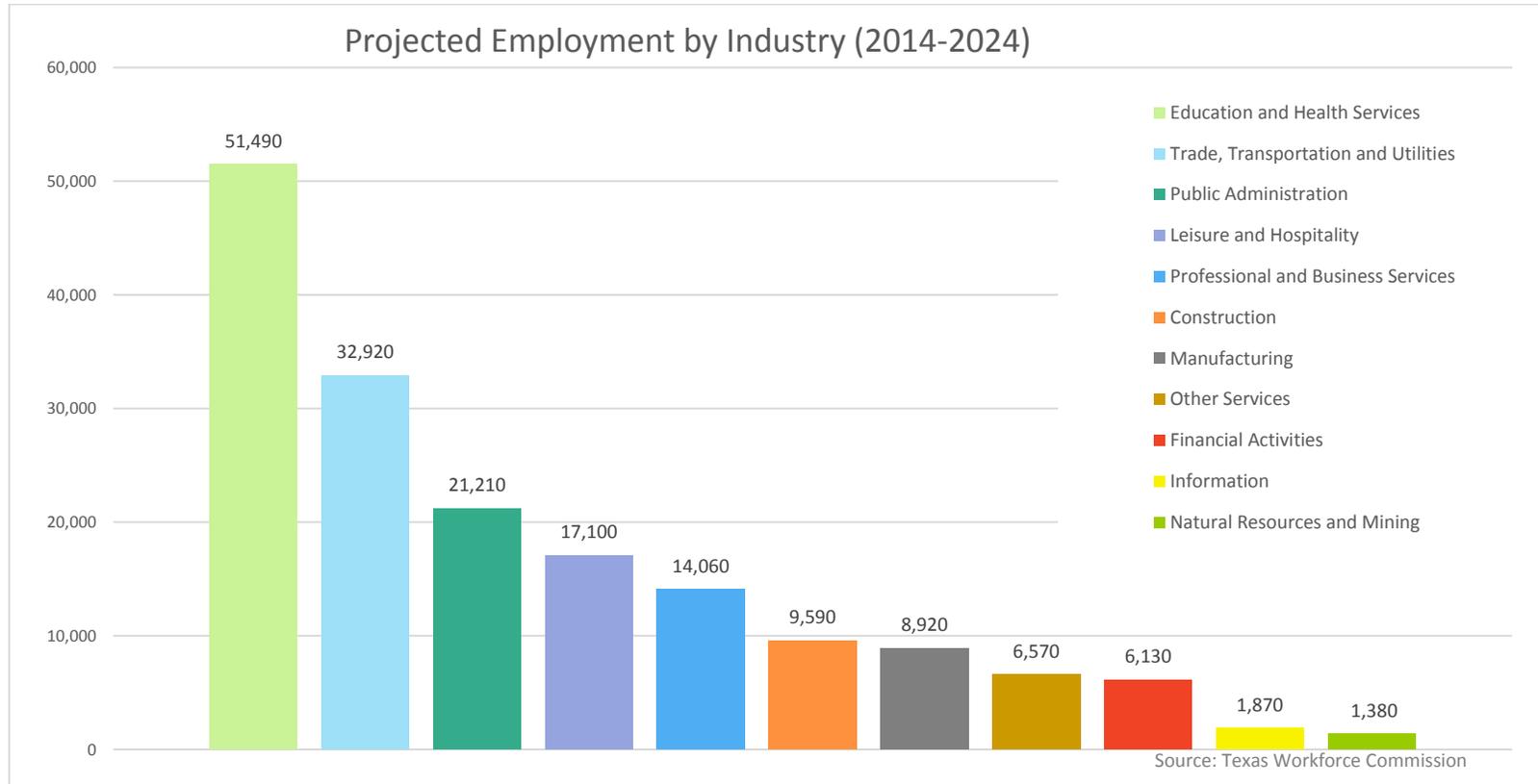
Exhibit 5: Share of Employment by Industry, 2016



By the year 2024, employment in Central Texas Public Administration industry is projected to surge to approximately 21,210, surpassing Leisure and Hospitality industry. Steady growth is expected in all other areas of employment, as shown in Exhibit 6.

Exhibit 6: Share of Employment by Industry

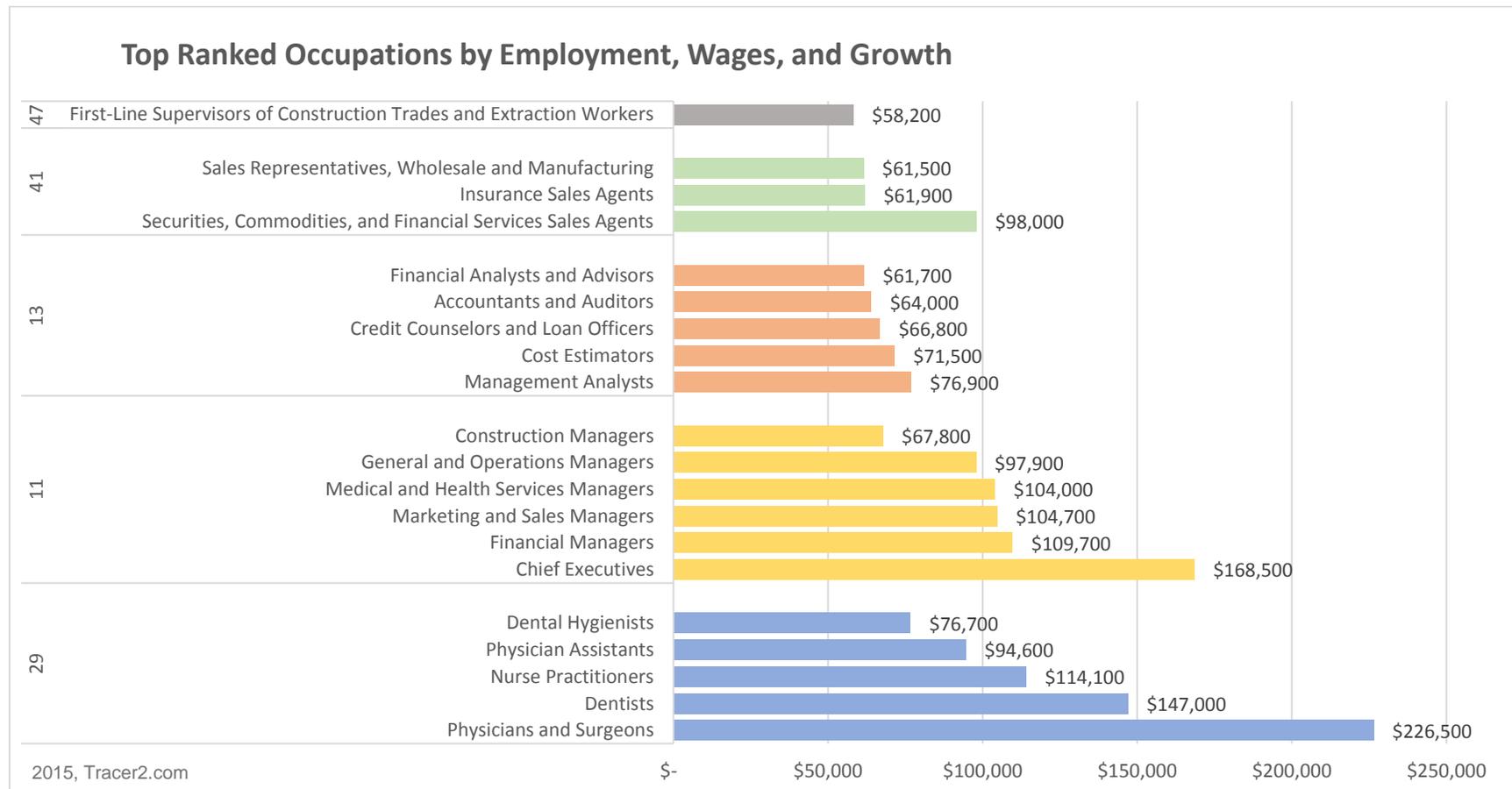
CTCOG Region



Occupations were ranked by analyzing three factors: number employed, five-year growth, and average annual wages. The top 20 occupations, as ranked, are shown in Exhibit 7. Note that not all industries are represented as this is a snapshot of the most numerous, growing, and well-paid occupations from a list of 460 SOC job fields, grouped by industry, across the Killeen-Temple MSA. See the Bureau of Labor Statistics for a complete explanation of the Standardized Occupation Codes (SOC). [4]

CTCOG Region, from 2011 Quarter 4 to 2016 Quarter 4

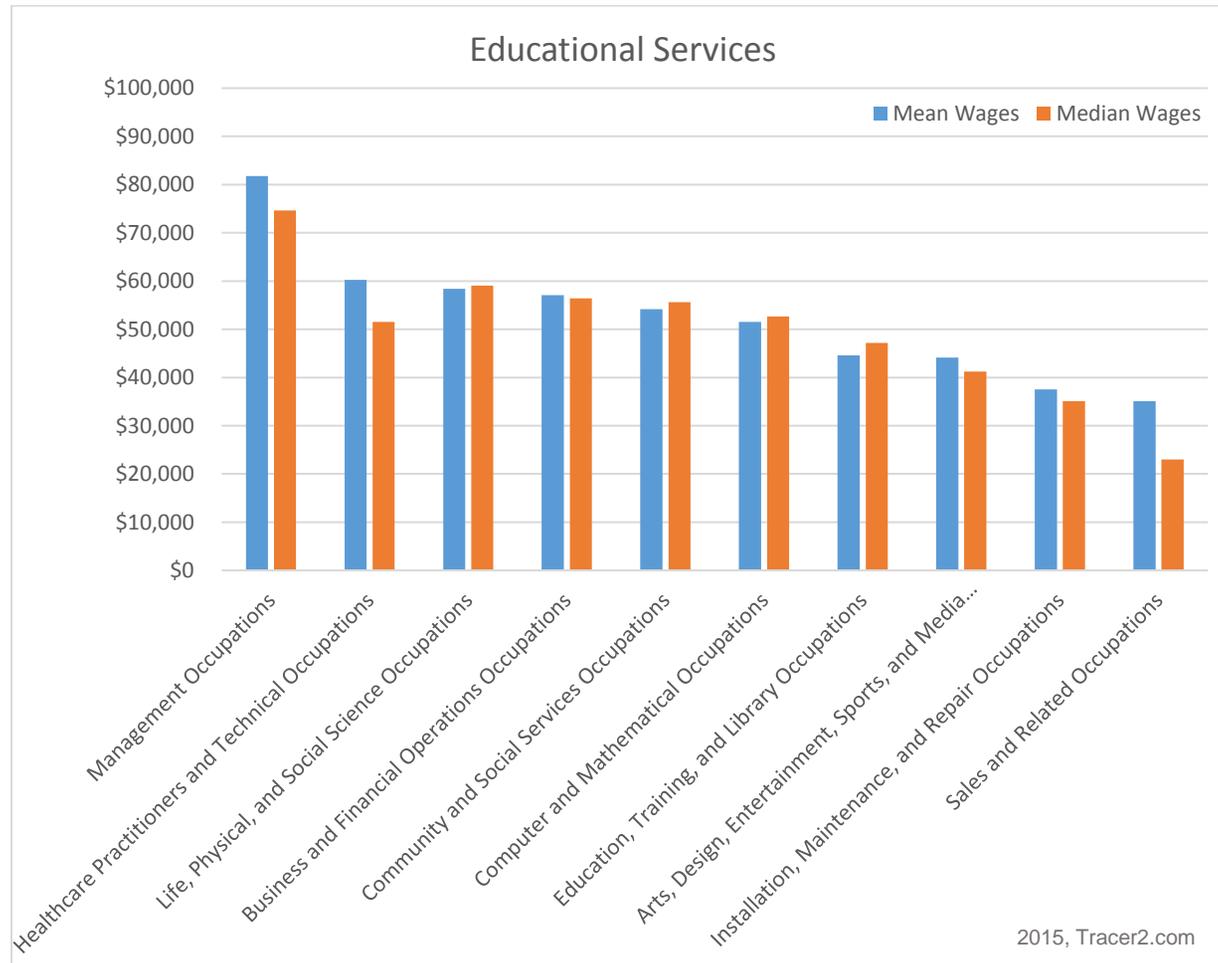
Exhibit 7: Top Ranked Occupations



The following wage information on Exhibits 8.1 – 8.6 were compiled by industry sector to show the differences in each individual job in the titled industry sector.

CTCOG Region

Exhibit 8.1: Regional Median and Mean Wages by Industry Sector
2015, Tracer2.com



CTCOG Region

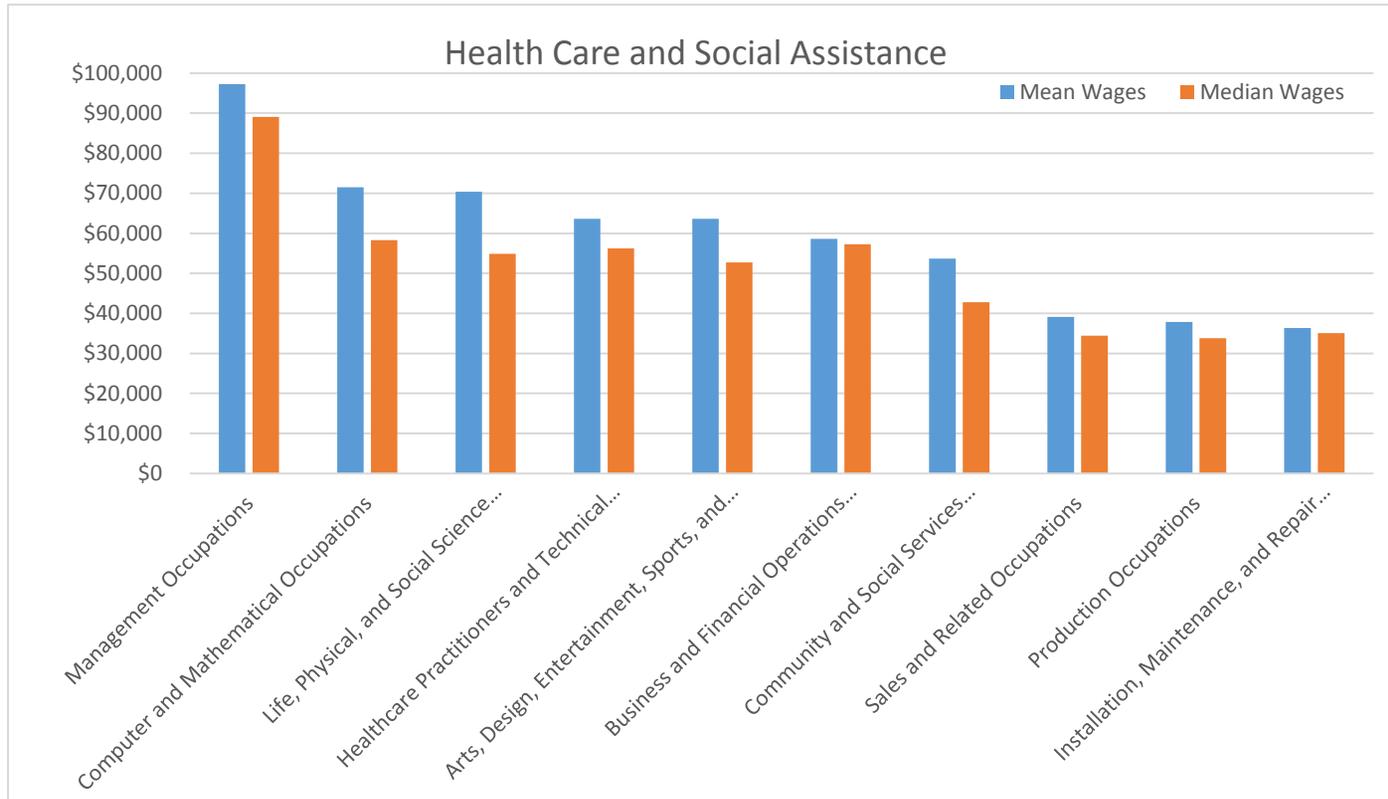
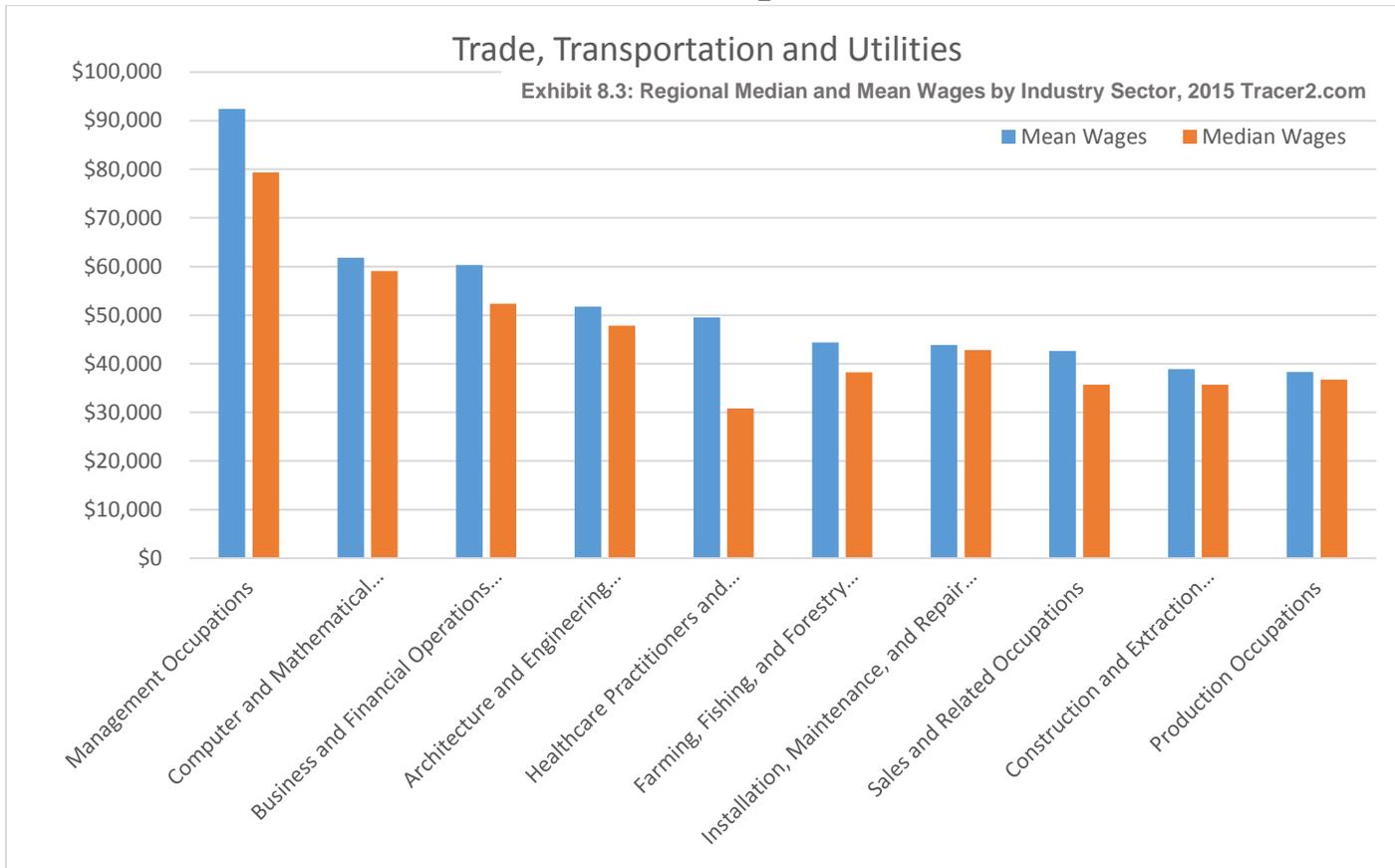


Exhibit 8.2: Regional Median and Mean Wages by Industry Sector, 2015 Tracer2.com

CTCOG Region



CTCOG Region

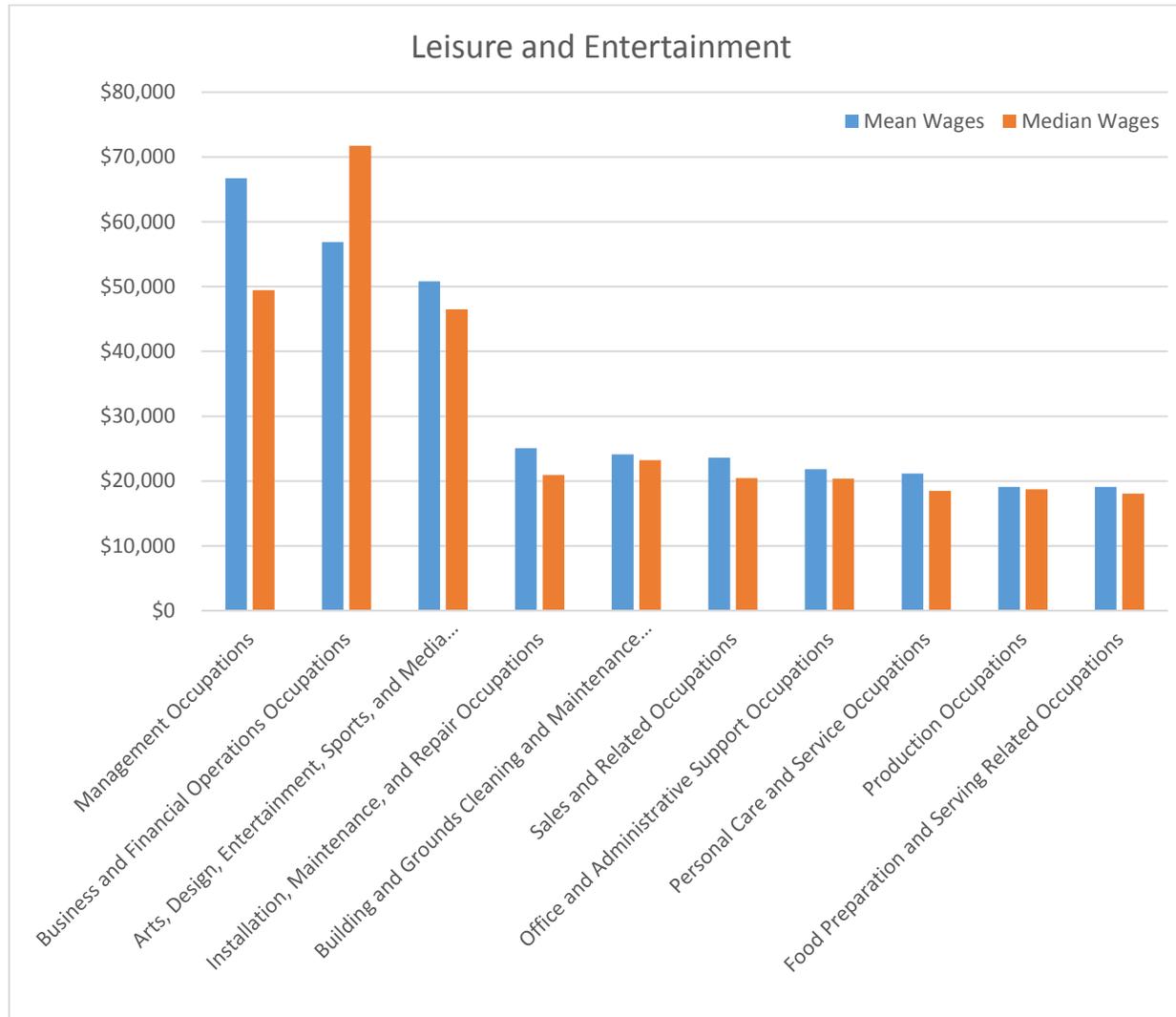


Exhibit 8.4: Regional Median and Mean Wages by Industry Sector, 2015 Tracer2.com

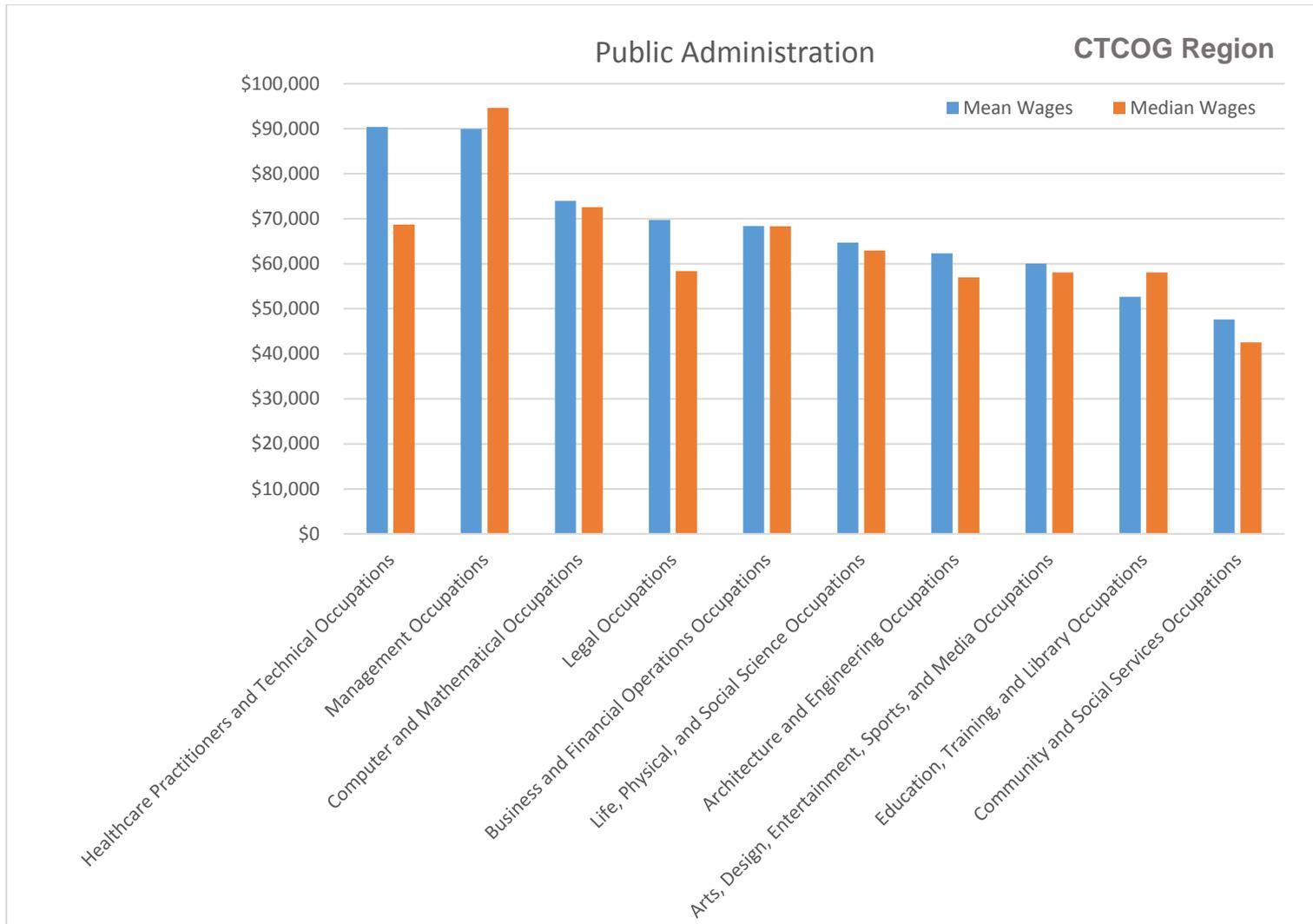


Exhibit 8.5: Regional Median and Mean Wages by Industry Sector, 2015 Tracer2.com

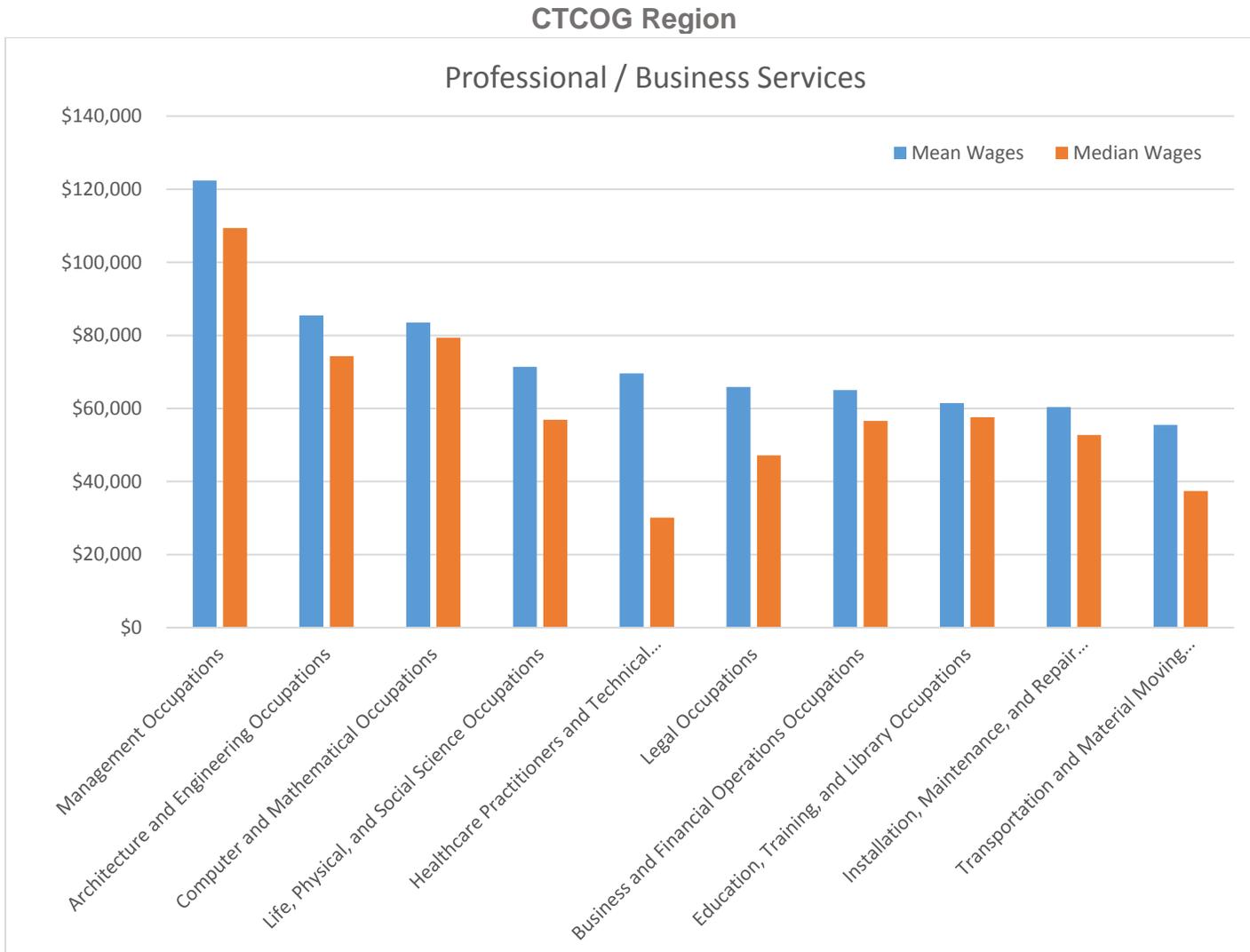


Exhibit 8.6: Regional Median and Mean Wages by Industry Sector, 2015 Tracer2.com

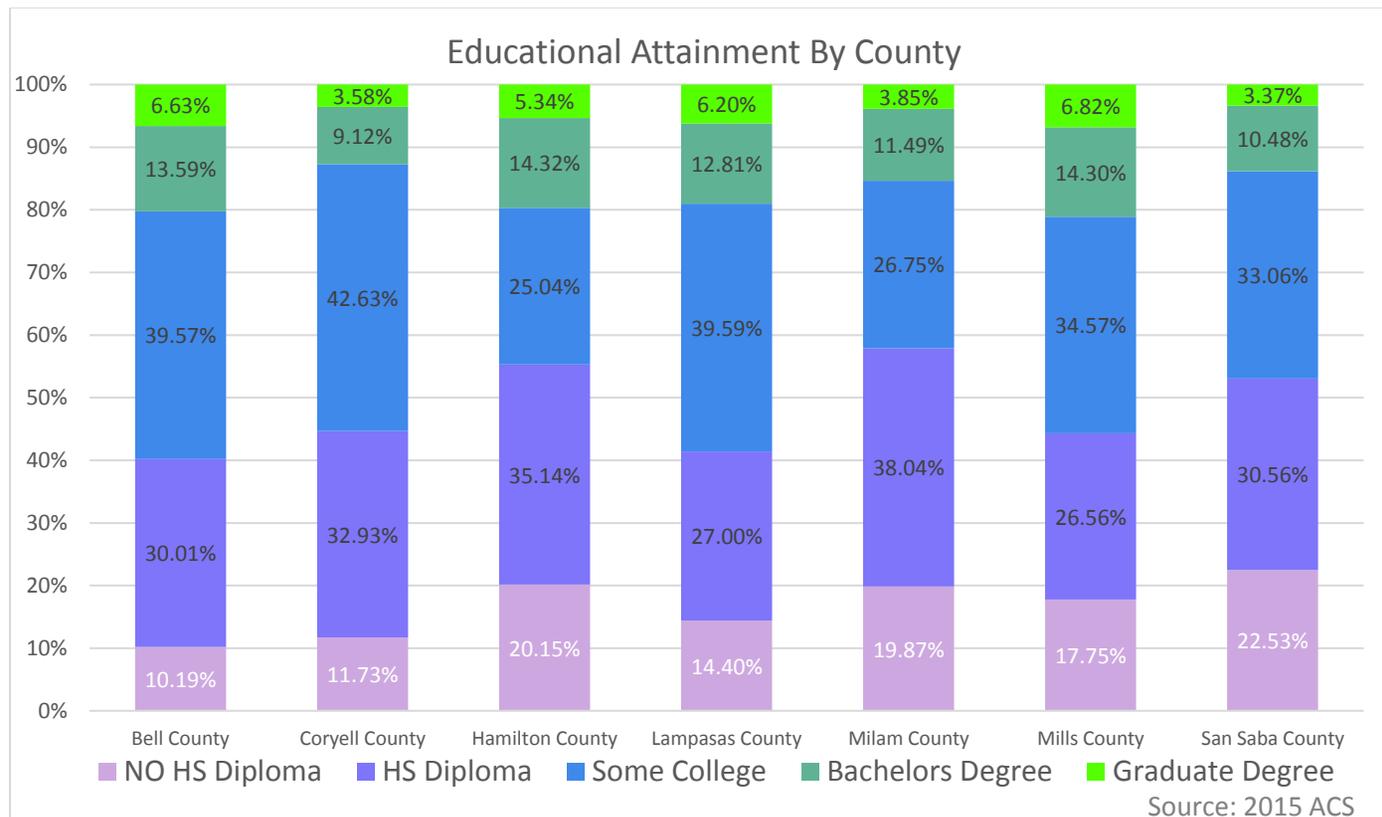
National Association of Industry Codes (NAICS)	Industry	Average Annual % Change in Employment 2012-2017	Forecast Over the Next 10 Years		Central Texas Council of Governments Avg. Annual Growth Percent
		Central Texas Council of Governments	Texas	USA	
11	Agriculture, Forestry, Fishing and Hunting	-0.1%	0.3%	0.8%	-0.3%
21	Mining, Quarrying, and Oil and Gas Extraction	7.3%	-2.5%	-4.5%	0.6%
22	Utilities	4.7%	0.3%	0.1%	0.0%
23	Construction	3.5%	3.4%	3.1%	1.6%
31	Manufacturing	0.9%	0.0%	0.9%	-0.1%
42	Wholesale Trade	3.3%	2.1%	1.0%	1.0%
44	Retail Trade	3.1%	2.4%	1.4%	1.1%
48	Transportation and Warehousing	-2.3%	3.3%	2.5%	0.8%
51	Information	-10.0%	0.5%	0.8%	-0.2%
52	Finance and Insurance	3.9%	2.4%	1.1%	1.2%
53	Real Estate and Rental and Leasing	4.3%	2.9%	1.9%	0.9%
54	Professional, Scientific, and Technical Services	-1.5%	3.7%	2.6%	1.9%
55	Management of Companies and Enterprises	35.2%	7.4%	3.0%	1.2%
56	Administration & Support, Waste Management, and Remediation Services	0.5%	2.9%	2.7%	1.4%
61	Educational Services	0.7%	1.3%	0.7%	0.9%
62	Health Care and Social Assistance	2.2%	2.8%	2.5%	2.5%
71	Arts, Entertainment, and Recreation	1.9%	3.5%	2.3%	1.5%
72	Accommodation and Food Services	2.5%	4.2%	3.0%	1.2%
81	Other Services (except Public Administration)	1.0%	1.2%	-0.1%	1.2%
92	Public Administration	-1.7%	0.3%	0.0%	0.4%
99	Unclassified	6.7%	20.0%	13.0%	1.0%
	Total - All Industries	1.4%	2.3%	1.7%	1.3%

Source: JobsEQ®

EDUCATION AND WORKFORCE

The housing industry in the Central Texas region has continued to surge with the Heavy and Special Trade Construction sector adding 2,203 jobs between 2013 and 2016. The region is home to four higher education institutions; Central Texas College, Temple College, the University of Mary Hardin Baylor, and the newly established Texas A&M -Central Texas.[1]

Exhibit 9: Regional Educational

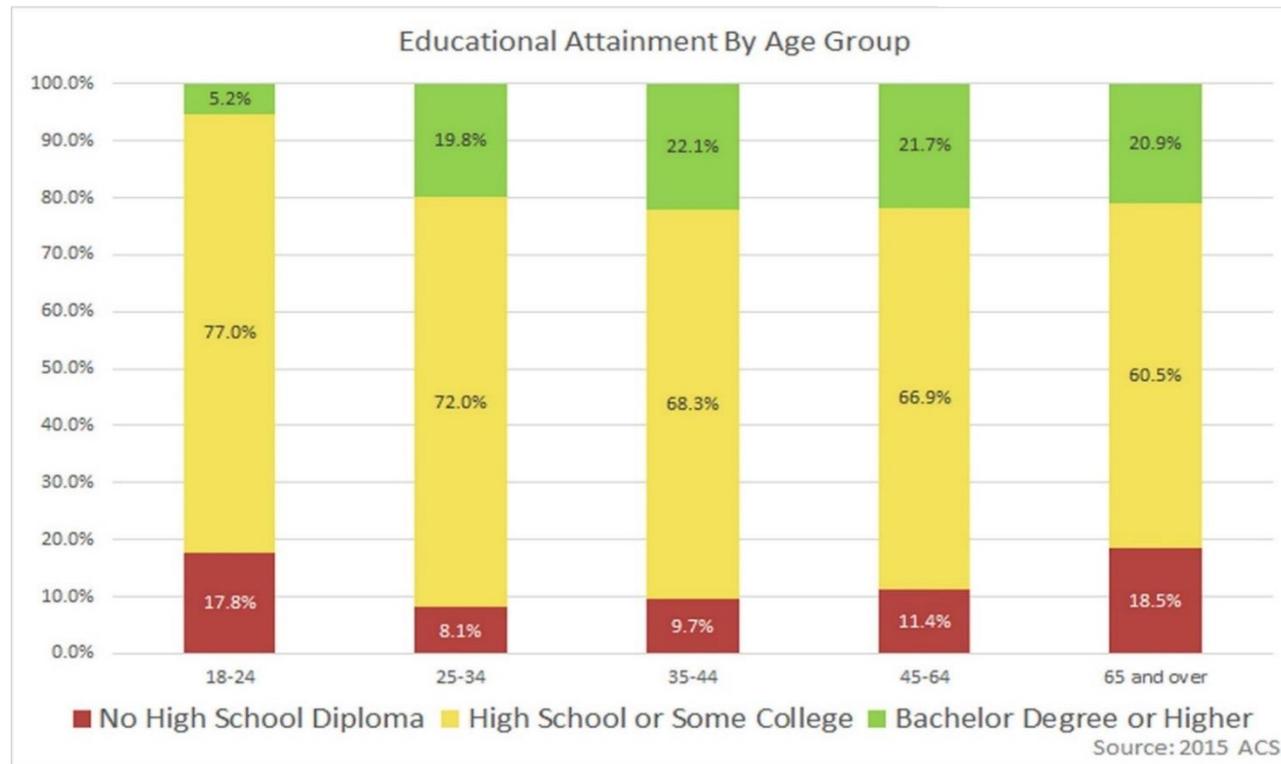


REGIONAL EDUCATIONAL ATTAINMENT

Twenty percent of the Central Texas Region, ages 25 and up, have a Bachelor’s Degree or higher. This indicates that education is a high priority, but room to improve is evident. In the 18-24 age group, 17.8% do not have high school diplomas. This may indicate a priority for the region to address, in terms of future growth and education.

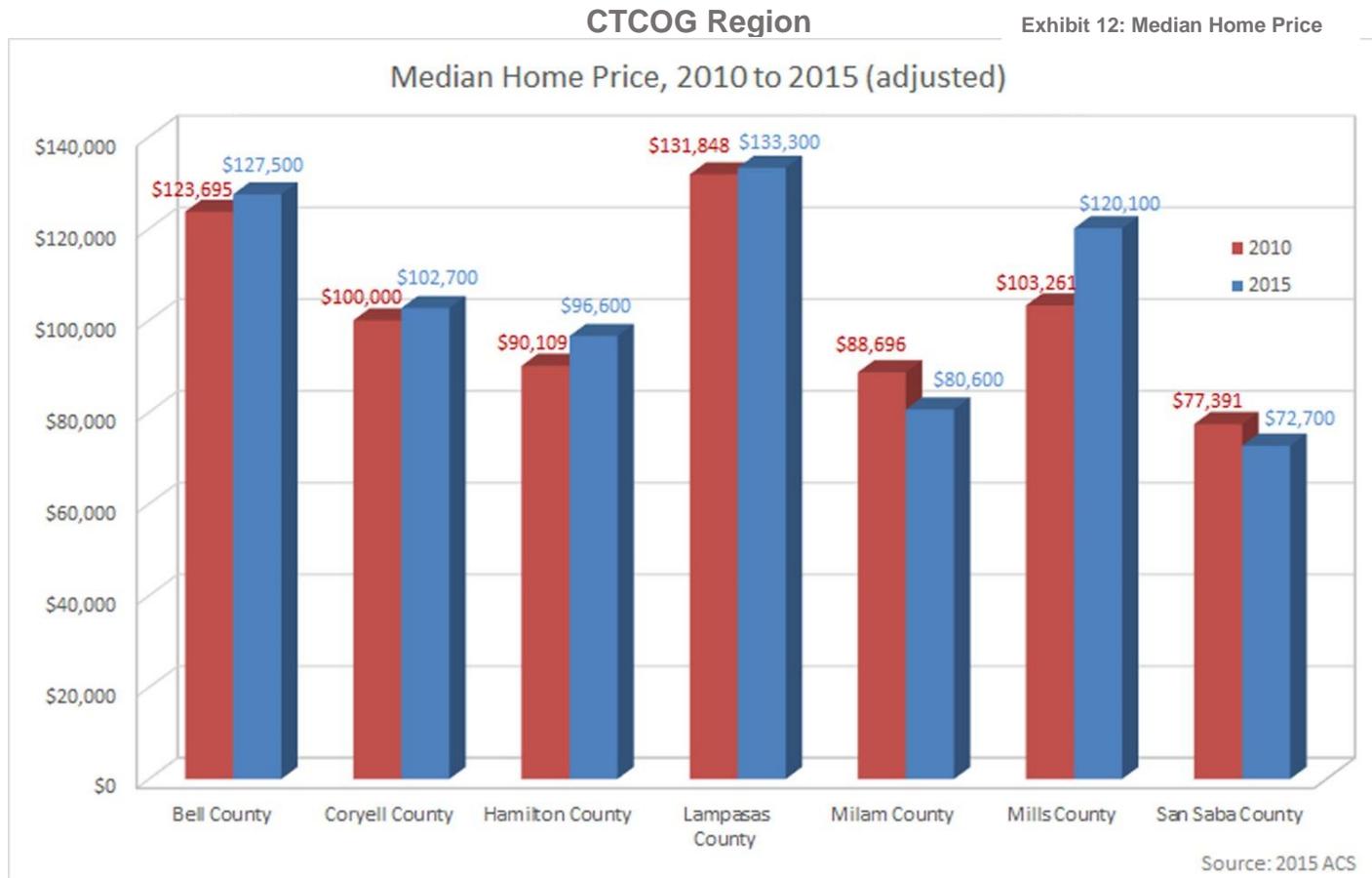
CTCOG Region

Exhibit 10: Educational Attainment by Age



HOUSING AND TRANSPORTATION

The seven counties in the CTCOG region had rising median home prices during 2010 to 2015, ranging from a 1% increase in Lampasas County to a 16.5% increase for Mills County. The two smaller counties (Milam and SanSaba) median home prices dropped 6.5%-10%.



CENTRAL TEXAS COMMUTE PATTERNS

Recognizing that residents may work in one community but live, pay taxes, and spend most of their income where they live, draws attention to the importance of exploring commuting patterns. Using “residence adjustment” as a means to assess the degree to which the Central Texas regional area serves as a bedroom community, the change from \$244,911 in 2010 to \$194,153 in 2011 indicates that the Workforce Area experienced substantial loss of local income. A negative number implies that Central Texas workers commute into the region to earn income but do not reside here. Growth over time of negative residence adjustments generally implies an eroding tax base for the region. Similarly, a positive figure implies that on balance the region exports jobs and income to residents of other regions. [8]



WATER AND AIR

The graph represents the total estimated water consumption by use in Bell, Coryell, Hamilton, Lampasas, Milam, Mills and San Saba counties from 2010 through 2014. These uses include municipal, manufacturing, mining, irrigation and livestock. From 2010 through 2014, municipalities used the most water during this five year period, followed by manufacturing, irrigation, livestock and mining. 2011 saw the highest amount of water being used with an estimated total of 153,000 acre-ft. which equals approximately 50 billion gallons of water. From 2012 to 2014, the amount of water being consumed decrease each year with 2014 being the lowest at an estimated total of 133,000 acre-ft which equals approximately 43 billion gallons of water. Estimated water consumption data was collected through the Texas Water Development Board.

Water Consumption

CTCOG Region

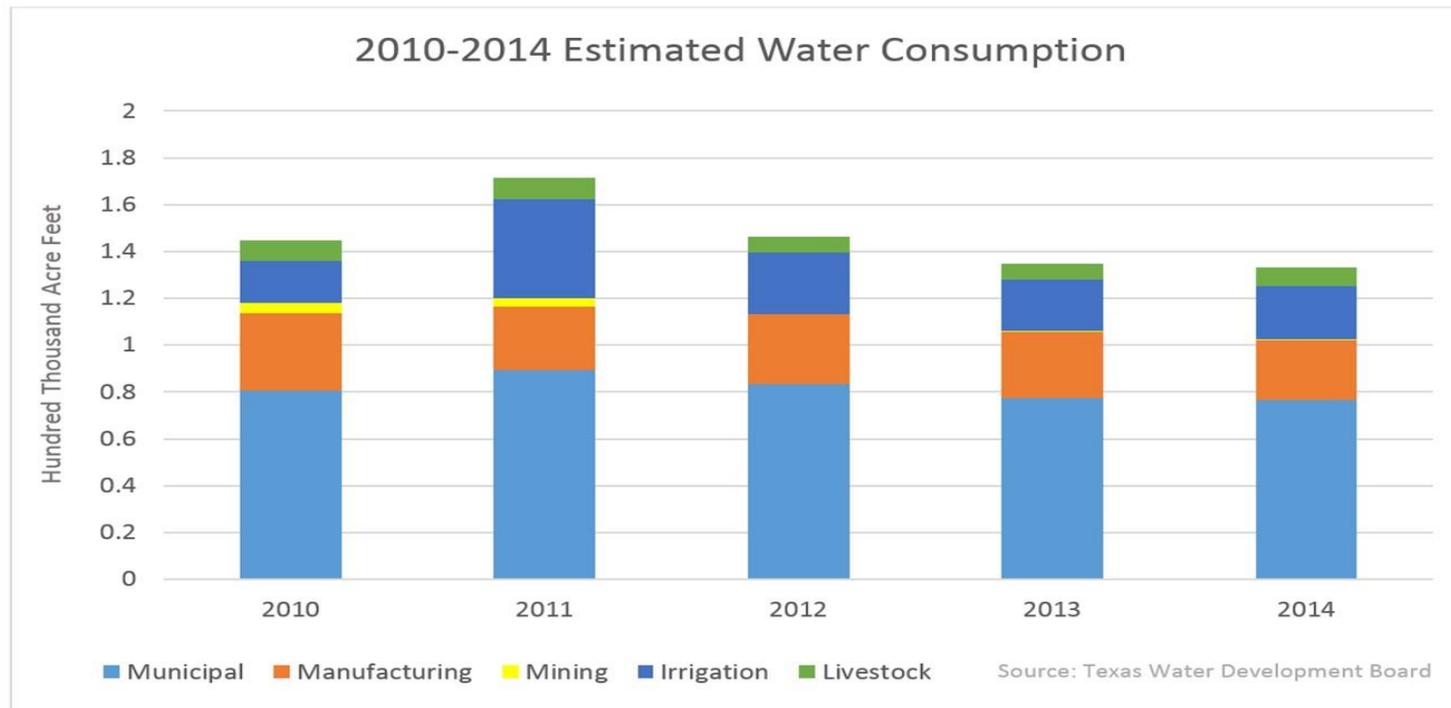
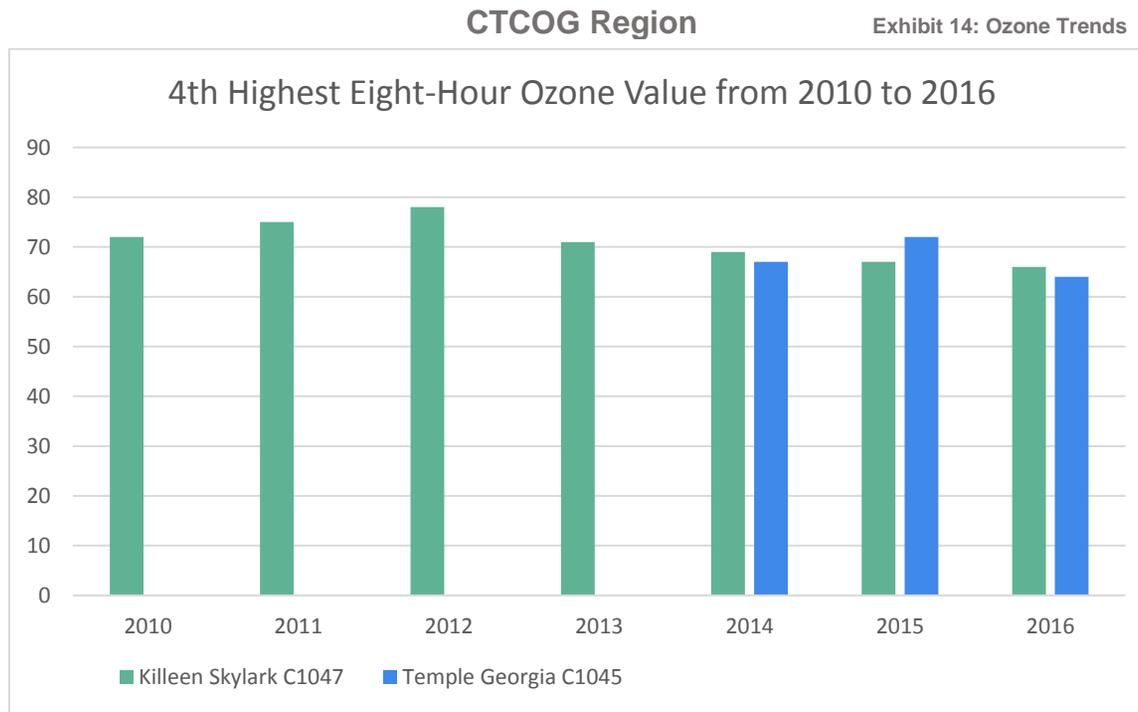


Exhibit 13: Water Consumption Trends

Air Quality

The graph in Exhibit 14 represents the 4th highest eight-hour ozone value from 2010 to 2016 at two ozone monitoring stations in Bell County. Stations are located at Killeen Skylark Field and the other one at West Temple Park near Georgia Avenue. The EPA requires Bell County to measure ozone values to remain in compliance with the National Ambient Air Quality Standard (NAAQS) of 70 parts per billion. The EPA uses the Design Value, which is a 3-year average of the 4th highest 8-hr ozone average, to determine if Bell County remains in compliance to the NAAQS standard. To determine the 8-hr ozone average, each station takes an ozone reading for each hour of the day. The 8-hr average is the average of each eight-hour block period and the highest average is the ozone reading for that day. Data used for this graph was collected by Texas Commission on Environmental Quality.



Source: https://www.tceq.texas.gov/cgi-bin/compliance/monops/8hr_4highest.pl

Demographics Summary						
	Percent			Value		
	Central Texas Council of Governments	Texas	USA	Central Texas Council of Governments	Texas	USA
Demographics						
Population ⁶	—	—	—	479,883	27,862,596	323,127,513
Population Annual Average Growth ⁶	1.6%	1.8%	0.8%	7,011	450,302	2,474,760
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over)	54.9%	64.3%	63.3%	193,105	13,006,330	158,897,824
Armed Forces Labor Force	8.2%	0.5%	0.4%	28,784	95,458	1,015,464
Veterans, Age 18-64	18.5%	5.6%	5.5%	48,292	927,000	10,750,884
Median Household Income ²	—	—	—	\$49,237	\$53,207	\$53,889
Per Capita Income	—	—	—	\$22,817	\$26,999	\$28,930
Poverty Level (of all people)	15.2%	17.3%	15.5%	66,895	4,472,451	47,749,043
Mean Commute Time (minutes)	—	—	—	20.8	25.6	25.9
Commute via Public Transportation	0.3%	1.6%	5.1%	583	188,363	7,362,038
Educational Attainment, Age 25-64						
No High School Diploma	9.9%	16.8%	11.8%	23,213	2,320,136	19,736,243
High School Graduate	28.5%	24.7%	26.4%	66,809	3,407,798	43,982,863
Some College, No Degree	29.9%	22.9%	21.7%	70,134	3,159,912	36,187,232
Associate's Degree	10.6%	7.2%	8.8%	24,792	987,726	14,742,654
Bachelor's Degree	14.4%	19.1%	19.9%	33,771	2,638,055	33,245,950
Postgraduate Degree	6.8%	9.3%	11.4%	15,895	1,283,284	18,952,103
Housing						
Total Housing Units	—	—	—	188,326	10,305,607	133,351,840
Median House Value (of owner-occupied units) ²	—	—	—	\$119,343	\$136,000	\$178,600
Social						
Enrolled in Grade 12 (% of total population)	1.5%	1.5%	1.4%	6,886	388,995	4,451,334

Source: JobsEQ®

3. SWOT ANALYSIS

SWOT ANALYSIS

Responding to the trends outlined in the previous section requires an organizational framework that categorizes those trends and leads to development responses. The CEDS utilizes a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats). The SWOT framework is presented below, and each component is analyzed in the subsections that follow.

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Population & job growth • Low Cost of Living • Central Location • Natural Resources • Accessibility to higher education • Quality of Life • Large Military presence • Transportation Routes and Highway Systems • Access to Healthcare System 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Limited Telecommunications Infrastructure • Limited Water/Wastewater Distribution • Lack of High Paying Jobs • Lack of Night Life / Entertainment • Educational Disparities, especially for rural counties • Limited Affordable Programs for disadvantaged Youth
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Digital Infrastructure Readiness • Unified Development Codes • Military Transition • Talent Retention • Smart traffic solutions • Alternative Energy sources • Developable Land • Business Retention Investments 	<p>THREATS</p> <ul style="list-style-type: none"> • Base Realignment and Closures (B.R.A.C.) • Resource constraints (water, transit, agriculture) • Uncontrolled population growth • Restrictive Federal Policies • Political disconnect between local and state governmental authorities • Limited Public school funding

STRENGTHS

- **Population & job growth**
- **Low Cost of Living**
- **Central Location**
- **Natural Resources**
- **Accessibility to higher education**
- **Quality of Life**
- **Large Military presence**
- **Transportation Routes and Highway Systems**
- **Access to Healthcare System**

Population growth in the region is very healthy (particularly in the larger cities such as the Killeen-Temple metropolitan area); however, managing the growth presents challenges, some of which are only in the beginning stages if growth continues as projected. However, with careful planning, dedicated community leaders, local colleges, and the well-developed and highly skilled workforce from the Ft. Hood and the CTCOG region has a promising future of wealth and well-being.

Along with having a central location and an abundance of natural resources, Central Texas has a comparatively low cost of living which is one of the most compelling assets of the region.



Transportation ease and accessibility make other strengths possible. For instance, the time it takes to travel to get access to healthcare or higher education anywhere in Central Texas, is minimal in comparison to many other places. Therefore, the transportation systems give us easy access to quality healthcare from anywhere in the

region. It also gives us quick accessibility for attaining a higher education while living off campus. Three of the major universities in Texas: University of Texas, Texas A & M, and Baylor are all along a highway system whereby a student could be at their intuition within a 2-hour time frame – from anywhere in the Central Texas region.



The Central Texas region is also the beneficiary of a strong reputation for an excellent healthcare system, with Baylor Scott & White Hospital in Temple. The Scott & White Healthcare System is a non-profit collaborative health care system which encompasses one of the nation's largest multi-specialty group practices. Scott & White employs more than 14,000 employees, 1,200 physicians and scientists, and is the primary clinical teaching facility to more than 300 medical residents and fellows in training at the Texas A&M Health Science Center College of Medicine. In addition, the Scott & White Health Plan serves more than 215,000 members, is the highest-rated plan in Texas and one of the highest-rated plans in the nation and is consistently recognized for member satisfaction.

The CTCOG Region is well known for having one of the largest military installations in the world and the largest military base in the world (by area), Fort Hood. It encompasses more than 215,000 acres. That reputation is a key strength in efforts to recruit new businesses and families to the region. To complement business attraction efforts, the Central Texas region provides considerable resources to support entrepreneurship.

Perhaps it is the Quality of life in Central Texas that is exceptional, with wildlife, lakes, rivers, aquifers, streams and quiet country living! Along with that peaceful picture, there is the framework of residential neighborhoods that are convenient to area businesses that add to the big picture of easy living in Central Texas.



WEAKNESSES

- **Limited Telecommunications Infrastructure**
- **Limited Water/Wastewater Distribution**
- **Lack of High Paying Jobs**
- **Lack of Night Life / Entertainment**
- **Educational Disparities, especially for rural counties**

Perhaps one of the most frustrating weaknesses of the region would be the inconsistency of high speed internet / overall telecommunications infrastructure. Where some areas (both rural and urban) have high speed internet, other areas struggle to make otherwise simple connections to internet access.



Equally as challenging is the inconsistency of water/wastewater distribution. While some areas have plenty of free-flowing clean water with few wastewater issues, other areas (mostly rural) suffer with older pipes and septic tanks.

Though the region has many strengths, it does also have competitive disadvantages, or weaknesses as they are termed here. First, though job creation in the region is strong overall, it is strongest at the mid and low- paying levels of the employment spectrum. In the market for high paying jobs, there is often a mismatch between the applicant's expectations and the wages an employer offers.

Entertainment in Central Texas is perfect for families of all age groups. However, night life for young professionals is difficult to find in the region and they often drive to Waco, College Station or Austin to find it.

In addition to the other issues, there are the educational disparities. The students have a great selection for a two-year degree, or to begin their first years in college in the Central Texas region. Often, there is a disconnect between education attained in high school verses what the universities expect from high school graduates. Apprenticeships and technical skill sets are needed in Public schools to meet the needs of businesses in the region.



OPPORTUNITIES

- **Digital Infrastructure Readiness**
- **Unified Development Codes**
- **Military Transition**
- **Talent Retention**
- **Smart traffic solutions**
- **Alternative Energy sources**
- **Developable Land**
- **Business Retention Investments**

The opportunities within the region are golden. With digital infrastructure at the doorstep, Central Texans must be ready to take advantage of its potential soon to ensure that the region is suited for high tech industry. Going hand in hand with this idea is “talent retention”. The talented and gifted workforce is the region’s pride and joy. Ensuring that the talent has plenty of motivation to remain in Central Texas and the provision of a stable and up-to-date telecommunications systems are some of the tools needed to do just that.

The military personnel have many times gone from high school to being trained in the military without the experience of applying for jobs or being trained in the civilian world. Transition programs are an enormous aid to the many to cross over into becoming a civilian again.

A vital document that would consolidate all development-related regulations including zoning requirements, subdivision regulations, design and development standards, and review procedures between the Fort Hood area and the Central Texas Region is the Unified Development Code. The UDC has several advantages over maintaining separate zoning and subdivision ordinances.

Central Texas must tap alternative energy sources if the region intends to be good stewards of land and

money. These sources could free us from future gas and oil shortages or outages. In Central Texas, accessible and developable land is at their fingertips. A Windfarm in Mills County has provided opportunities for future energy alternatives as well. Taking initiative to protect it and utilize these open opportunities would be advantageous for economic growth and wealth.

Business Retention Investments are plentiful in the region and can strengthen and expand the economy and keep businesses in Central Texas alive and well! The DDOCT has recently assembled a Business Retention and Expansion Task force in an effort to boost the economy in Central Texas.

The Central Texas region is fortunate to have numerous stakeholders involved in promoting economic development throughout the area. There is already strong collaboration at work across these local and regional areas, but the opportunity always exists to strengthen coordination and harmonize development efforts across the region. Greater information sharing and complementary initiatives (e.g., regional GIS services or complementary target industries across localities) are examples of such coordination.



THREATS

- **Base Realignment and Closures (B.R.A.C.)**
- **Resource constraints (water, transit, agriculture)**
- **Uncontrolled population growth**
- **Restrictive Federal Policies**
- **Political disconnect between local and state governmental authorities**
- **Limited Public school funding**

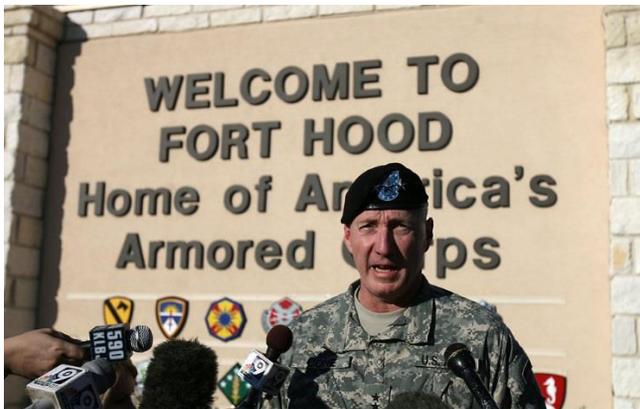
Any reduction in force caused by the Base Realignment and Closure process (BRAC) or any other federal policy will have a significant and possibly devastating effect on the Central Texas economy. A close working relationship with the community and garrison leadership will mitigate any negative impacts to both Fort Hood and the surrounding region.

Resource constraints are on the rise with a growing population. The region has limited water resources, and unchecked development without efforts to conserve water threaten those resources. Similarly, the transportation and local food/agricultural production resources are not scaling at the pace of population growth.

Educational funding for public schools have been diminishing over the past couple of decades. The number one promise for the future of the region/state/nation is education. Public education funding must be addressed and supported by local and state authorities to meet the needs of the future.

Many times, there is a disconnect between the local and state governmental authorities. The local authorities often recognize the importance of issues that arise, while the state authorities do not see the value or importance of necessary dollars being invested in certain areas. It's important for the legislature to ensure that federal policies allow us to grow and be successful.

Uncontrolled population growth can result in any of the above threats not being taken seriously or planned for as growth is projected. The region's growth places a burden on city planners, government officials and developers to manage the growth of the region that preserves distinct sense of place. The threats can be minimized when recognized and averted when plans are in place.



Scarcity Creates Demand



4. STRATEGIC DIRECTION AND ACTION PLAN

THEME 1: QUALITY OF PLACE PRESERVATION

Preserving the quality of place in Central Texas includes many facets of the region's surroundings. The low cost of living, excellent transportation routes, natural resources, recreation, and access to quality healthcare systems are some of Central Texan's greatest treasures. Whereas leisure & entertainment venues are limited and improving our transit system and keeping the agricultural community in place is a necessity. Likewise, uncontrolled population growth threatens communities when infrastructure is not in place, such as adequate roadway systems and water/wastewater systems. The protection, preservation and improvement of these areas will ensure that quality of place in Central Texas remains far above the standard while instilling in us, inner peace and pride for communities.

THEME 2: TELECOMMUNICATIONS INFRASTRUCTURE AND READINESS

Population growth, education, transportation, healthcare, business retention, etc. are all affected by the ability to function in a high-tech world. Without the scalable infrastructure in place, growth will not thrive and communities will lose the ability to keep their populations from shrinking. The local, state, and federal authorities agree to put policies in place to ensure every area of the nation has access to high speed internet. The CTCOG region currently has digital infrastructure readiness and is working towards high speed telecommunications region-wide.

THEME 3: MILITARY INFLUENCE

Base Realignment can be a positive scenario by enriching economic growth with the expansion of the military. But planning must be in place for any reduction that could be made in the future. Fort Hood is now the largest active duty armored post in the U.S. Armed Forces. There are nearly 40,000 Soldiers who work on Fort Hood not including civilian staff and their families. The Soldiers of Fort Hood are infantrymen, cavalrymen, and tankers. They are engineers, mechanics and health care professionals. They are male and female and are the life of Fort Hood. Their training gives Fort Hood its purpose, just as Camp Hood troops did back in 1942. [5] Therefore, close attention to federal policies and legislative restrictions are necessary to guard against any negative actions that may affect the troops. When soldiers return to civilian life, Central Texas offers them a great opportunity to transition from the military back into the work place. Fort Hood's benefit to the community and economy includes the soldiers' families as they rent and buy houses, shop area market places, dine, and work throughout our region, boosting the economy further. The soldiers and their families are all a part of what has made Fort Hood "The Great Place" for more than seven decades.

THEME 4: EDUCATION AND WORKFORCE

The vitality of the Central Texas region is predicated upon the skills and productivity of its workforce. Continued growth in the region requires an expansion of employment opportunities. Central Texas enjoy freedom of choice with the accessibility to higher education. The region is gifted with a skilled and talented population and there is great opportunity in talent retention programs to be in place. With military transitional programs already in place, the highly skilled Fort Hood soldiers are a great asset to Central Texas. Population and job growth are vibrant in the larger cities; however, higher paying jobs are limited. Some of the rural counties experience slow growth and educational disparities. Education should be paramount and consistent with community needs. Partnership programs from colleges and universities with area high schools and trade schools are in place and essential, not only for instructional purposes, but in meeting the vision and needs of the community. Restrictive federal policies have limited public school funding and it is necessary push for needed public school funding through our state and

federal legislatures. Similarly, Community Colleges will struggle to provide needed services to employers and job seekers without consistent and adequate state funding.

THEME 5: ECONOMIC RESILIENCE

Establishing economic resilience in a local or regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity. Having the Unified Development Code in place would enable areas of economic growth to happen quickly and in a seamless fashion. Strengths of the region are enhanced due to the central location and the expansion of Interstate Highways and other highway systems. Opportunities abound with the alternative energy sources, developable land, and business retention investments at the local level. However, the threats and weaknesses of limited water/wastewater distribution and other resource constraints is the red flag to make changes for a positive effect on the future of Central Texas. Special attention should be made to federal and state policies to repair the disconnect between the governmental authorities.

The Central Texas region overall is growing at a healthy pace, and it is incumbent on those shaping its development to guide it in a sustainable, efficient, and distinct direction.

ACTION PLAN

The Development District of Central Texas is fortunate to have stakeholders who are committed to their communities and desire to contribute to the implementation of this CEDS. The DDCT Board of Directors is comprised of a group of stakeholders from throughout the region's local governments to ensure that the diverse perspectives and interests in the region are reflected, as well as to give the DDCT efficacy in implementing the CEDS.

The Action Plan will be utilized as a tool for the Development District of Central Texas. The CEDS will guide the District with tools provided by the Strategic Direction and Action Plan as identified by the DDCT Board of Directors. Below, the Board identified the actions necessary to reach the Strategic Direction. As such, at the end of the calendar year, the District's performance will be evaluated by the Board of Directors. The methodology in place will determine the effectiveness of the performance measure (PM) and whether the set targets were achieved.

- I. Conduct grant search for funding that might enhance the access to natural resources and healthcare accessibility. Communicate funding opportunities to CTCOG members.
- II. Pursue support for increased regional broadband service in households through education, task forces, and outreach to elected officials.
- III. Partner with workforce, communities and others to build awareness of the military skills available for employers to assist in retaining soldiers in the region.
- IV. Continuation of the regional Leadership classes offered each year incorporating improvements as appropriate.

- V. Build communication systems whereby students and teachers in public schools will know what the expectations will be when entering college, such as organizing mentorship programs, Round table discussions, etc.
- VI. The DDCT will meet in conjunction with the Homeland Security Division of CTCOG to discuss the Hazard Mitigation Plan and find ways to provide community assistance and become familiar with how the Mitigation Plan will work.
- VII. Explore the need for GIS systems that link with municipal or economic development organizations and other business establishment databases to track development sites in areas of the region that are lacking in that resource.
- VIII. Participate in the establishment of coordinated leadership plan for disaster recovery to include a plan for short, intermediate, or long-term recovery needs.
- IX. A Rural Business Retention and Expansion Task Force is set in place to explore ways to expand and/or retain businesses in the region.

5. EVALUATION FRAMEWORK

Ultimately, a CEDS is only useful to the extent that it translates to positive developmental impacts in the region. Therefore, the following performance metrics are included as a vehicle for measuring the successful implementation of the CEDS and assessing that implementation’s development impact. The performance metrics are driven by the themes described in the previous section. Therefore, that framework has been applied to present the CEDS’ evaluation framework.

METRIC	VALUE AT PRESENT	SOURCE
THEME 1: QUALITY OF LIFE		
Grant search for funding and notifications to entities that might enhance the access to natural resources and healthcare accessibility. Number of natural resources and healthcare Grants Identified by CTCOG Economic Development and communicated to appropriate regional entities.	Grant search is ongoing, but tracking will be implemented in July, 2017. Grant search tracking program will identify and communicate applicable grants to regional entities.	DDCT reports.
Number of Grants administered by the Planning and Regional Services Division of CTCOG.	2 grants administered by CTCOG to regional entities.	
Establish a data base of grant writers.	None at present.	
If a Grant Writing Assistance program is implemented, then provide support offered and number of grants obtained.	None at present.	

Water consumption per capita maintained or reduced.	Current consumption data.	Regional water authorities.
THEME 2: TELECOMMUNICATIONS INFRASTRUCTURE AND READINESS		
Support for regional broadband connections should be pursued in ways of education, task forces, and outreach to elected officials. Number of programs and outreach per year.	Outreach currently conducted.	DDCT Board / staff minutes.
Number of Residential Fixed Broadband Providers at 25 Mbps/3 Mbps increased from one or none to multiple providers.	FCC Data as of 2016 shows 1 fixed provider for the CTCOG.	https://www.fcc.gov/reports-research/maps/bpr-2016-fixed-25mbps-3mbps-technology/
THEME 3: MILITARY INFLUENCE		
Partner with other programs and utilize the Heart of Texas Defense Alliance Report. Number of partnerships with workforce and other programs identified.	Soldier for Life program.	http://www.hood.army.mil/
THEME 4: EDUCATION AND WORKFORCE		
The Continuation and modification of the regional Leadership classes offered each year.	Content adapted to incorporate employer skill needs.	www.ddoct.org
To build communication systems whereby students and teachers in public schools will know what the expectations will be when entering college, such as organizing mentorship programs, Round table discussions, etc.	Increased Number of new programs available from school districts and higher education matching employer needs.	P20 Council currently functions to connect employers, public schools and higher education to ensure programs are in place to meet employer needs.

Share of population aged 25+ with post-secondary degree required by local employers.	Educational attainment by age group 17.8%.	ACS update.
THEME 5: ECONOMIC RESILIENCE	Establishing economic resilience in a local or regional economy requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity.	
The DDCT will meet in conjunction with the Homeland Security Division of CTCOG to discuss the Hazard Mitigation Plan and find ways to provide community assistance and become familiar with how the Mitigation Plan will work for economic disasters.	A Hazard Mitigation Plan is currently being developed in the Homeland Security Division at CTCOG.	CTCOG plan in place.
Evaluate the possibility of creating a GIS system that links with municipal businesses and other business establishment data bases to track development sites.	GIS systems have many tools available to assist in prevention and recovery in times of economic disaster.	CTCOG maintained system.
Coordination of Leadership should be established in case of disaster, by having a plan in place for short, intermediate, or long-term recovery needs.	Leadership in Central Texas is filled and effective and is not a threat currently.	Maintained and backfilled disaster recovery leadership – CTCOG records.

Media References:

[1] “On The Move”, Part 1 -Central Texas Industry Sector Analysis and the Role of Certifications in Hiring and Promotion - publication by The Workforce of Central Texas, January 2017.

[2] “On The Move”, Part 2 -Exploring the Concepts of Career Progressions and Career Lattices for Central Texas Workers - publication by The Workforce of Central Texas, January 2017.

[3] <https://www.perrymangroup.com/>

[4] Bureau of Labor Statistics

[5] <http://www.hood.army.mil/history.aspx>

Data and Graph Resources:

[6] Texas Demographic Center

[7] American Community Survey (ACS)– U.S. Census Bureau

[8] Texas Workforce Commission / Workforce Solutions of Central Texas 2017-2022 Strategic Plan

[9] Texas Water Development Board

[10] Texas Commission on Environmental Quality

[11] CTCOG Staff