

**AGENDA**

ECONOMIC DEVELOPMENT AUTHORITY

| THURSDAY, MAY 9TH |

| 8:00 AM |

COUNTY ADMINISTRATION BUILDING @ FIRST FLOOR CONFERENCE ROOM

107 N. KENT STREET WINCHESTER, VA

1. Call to Order
2. Approval of Minutes – March 7<sup>th</sup> || ACTION
3. Treasurer’s Report || ACTION
4. Joint Meeting with Board of Supervisors Recap || DISCUSSION
  - *Discussion on annual meeting with Board of Supervisors*
5. Legislative Event || DISCUSSION
  - *Discussion on event’s goals and format*
6. Targeted Business Update || ACTION
  - *Review of methodology to complete target business study and suggested specific sectors for evaluation*
7. Talent Strategy Vendor Selection || INFORMATION
  - *Identification of selected vendor and next steps*
8. Such other business as may come before this Authority

MINUTES  
ECONOMIC DEVELOPMENT AUTHORITY  
| THURSDAY, MARCH 7, 2019 |

A meeting of the Frederick County Economic Development Authority was held on Thursday, March 7, 2019, at 8:00A.M. in the County Administration Building, First Floor Conference Room, 107 North Kent Street, Winchester, Virginia.

**PRESENT:** Stan Crockett, Doug Rinker, Gary Lofton, John Riley, Bob Claytor and Heather McKay

**STAFF:** Patrick Barker and Donna McIlwee, Frederick County Economic Development Authority, Jay Tibbs, Deputy County Administrator, and Michael Bryan, Attorney

**MEETING CALLED TO ORDER:** Chairman Crockett called the meeting to order at 8:00 a.m.

**APPROVAL OF MINUTES**

The minutes from the January 3, 2019, meeting were presented.

On motion duly made by Mr. Claytor and seconded by Mr. Rinker, the minutes were approved by the following recorded vote:

J. Stanley Crockett	Aye
Robert Claytor	Aye
Bryan Fairbanks	Absent
Gary Lofton	Aye
Heather McKay	Aye
John Riley	Abstain (not present at that meeting)
Doug Rinker	Aye

**TREASURER'S REPORT**

Mr. Barker submitted the following report:

Checking Account - Bank of Clarke County as of February 28, 2019 - \$54,400.27.  
Savings Account - Scott & Stringfellow as of February 28, 2019 - \$1,204,252.79.

The Treasurer's Report was approved as submitted by the following recorded vote:

J. Stanley Crockett	Aye
Robert Claytor	Aye

Bryan Fairbanks	Absent
Gary Lofton	Aye
Heather McKay	Aye
John Riley	Aye
Doug Rinker	Aye

**BUSINESS RETENTION MANAGER PROJECT UPDATE**

Sally Michaels, Business Retention Manager, gave an overview of projects under her supervision.

**INCENTIVE POLICY**

Mr. Barker explained this document governs all aspects of the local incentive process (i.e., who qualifies, process for approval, who conducts the audit of a company’s performance, and who reviews performance agreements). Staff suggests the Board review this document annually. Building upon the approved 2017 Policy, staff has updated it to reflect current business targets and the average wage for the County. A copy of the proposed revised Policy was distributed to each Board member prior to this meeting.

Mr. Tibbs asked which business target had changed.

Mr. Lofton inquired if aerospace could be added to our targets. Mr. Barker stated the targets on the list are our first priority but that does not mean that others outside those parameters would not be considered. Business targets are revised annually based on where job growth is projected to occur and if the State does not forecast a large number of jobs for a specific business target, it is not included.

Mr. Riley made a motion to accept the revised Incentive Policy. Mr. Rinker seconded the motion which was approved by the following recorded vote:

J. Stanley Crockett	Aye
Robert Claytor	Aye
Bryan Fairbanks	Absent
Gary Lofton	Aye
Heather McKay	Aye
John Riley	Aye
Doug Rinker	Aye

**JOINT MEETING WITH FREDERICK COUNTY BOARD OF SUPERVISORS**

Mr. Barker explained that the 2014 MOU between the EDA and Board of Supervisors calls for an annual discussion and review of the BOS’s expectations for economic development.



Staff recommends structuring an agenda for this year's joint meeting to provide updates to the chief planned activities discussed at last year's meeting, as outlined below:

- Planned activity #1 – Maintain awareness of current and projected workforce needs and partner with appropriate local and regional partners to create solutions.
- Planned activity #2 – Encourage development of product, including “ready to go” business sites.

Examples of progress made and the next steps for each Activity will be given.

Mr. Barker said he would welcome any other ideas or suggestions for the meeting agenda.

Mr. Lofton stated he has received no feedback from other BOS members as to what subjects should be included in the agenda. Mr. Tibbs has not received any direction, either.

Mr. Barker stated that 2 possible meeting dates were given to the BOS and their preference is April 24 at 5:30 p.m. Once the date and time are confirmed, Board members will be notified.

### **1st QUARTER PERFORMANCE MEASURES**

Mr. Barker reviewed the 2018 performance measures report which had been distributed to Board members.

Mr. Claytor remarked that property views for the 1<sup>st</sup> quarter increased significantly. Mr. Barker stated that client interest ebbs and tides and the report counts each view whether from the same client or a different one.

### **SUCH OTHER BUSINESS AS MAY COME BEFORE THIS AUTHORITY**

Mr. Crockett welcomed Mr. Wiley, a member of Winchester City Council.

Mr. Riley inquired if there were any plans to organize something locally later this year for our legislative group. Mr. Barker stated there has been some conversation about dovetailing on the BOS Transportation Forum. Mr. Lofton said he had no concerns about the EDA having a separate event.

Mr. Riley stated he prefers an event to focus on the County and such things as agribusiness and its growth and new industries here since the last time we sponsored a tour of the area for our legislators. He suggested including lunch at an agribusiness site.



Mr. Crockett said we need to develop an agenda to make it interesting for everyone. He also cited the need to maintain a relationship with legislators.

Mr. Lofton stated we need to arrange something early before proposed legislation for the next year has to be submitted.

Mr. Barker will submit ideas at the next meeting.

**ADJOURN**

There being no further business to come before this Authority, the meeting was adjourned at 8:45 a.m.

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Stan Crockett  
Chairman

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Jay Tibbs  
Secretary



DATE: May 6, 2019

TO: Board of Directors,  
Frederick County Economic Development Authority

FROM: Patrick Barker, CEcD  
Executive Director

CC: Jay Tibbs  
Deputy County Administrator

RE: Joint Meeting with Board of Supervisors

On Wednesday, April 24<sup>th</sup>, the EDA and Board of Supervisors held their annual joint meeting to discuss and review the Board of Supervisors' expectations for economic development.

The following planned activities for the next 12 months were presented and discussed.

- Activity #1 | Partner with appropriate local and regional partners to create solutions for current and projected workforce needs.
  - Completion of the Shenandoah Valley Talent Solutions Strategy
  - Submission of a GO Virginia per capita grant for implementation of the Shenandoah Valley Talent Solutions Strategy
  - Assist the Workforce Initiative board with project implementation
- Activity #2 | Continue refinement of the business sites program.
  - Finalize a Business Ready Sites Loan Program Agreement with one or more of the characterized sites
  - Complete additional site characterizations should additional sites matching the approved criteria come to market

Staff is providing this summary to the Authority for information purposes and will answer any questions members might have regarding the priorities.

DATE: May 6, 2019

TO: Board of Directors,  
Frederick County Economic Development Authority

FROM: Patrick Barker, CECD  
Executive Director

CC: Jay Tibbs  
Deputy County Administrator

RE: Legislative Event

At the March EDA meeting, staff was directed to develop a local complementary and/or alternative event to the EDA's Annual Legislative Reception held in Richmond. To ensure a successful event, staff is requesting some guidance from the EDA regarding this event.

- What is the MAIN purpose of this event?
  - Showcase Frederick County as a business destination
  - Showcase EDA programs
  - Discuss legislative priorities
- What stakeholders are the preferred targets?
  - State elected officials
  - State economic development officials
  - State board of directors (i.e. VEDP, VDOT, CTB)
  - Federal elected officials
- Where the preferred timing?
  - Before November's election
  - After January 1, 2020

Collective responses to these questions will heavily influence the event's agenda and timing. Staff will formulate event options after this discussion. The previously approved legislative agenda is enclosed.

## FREDERICK COUNTY EDA LEGISLATIVE AGENDA 2019

Frederick County EDA believes it is vital that the Commonwealth of Virginia invest in programs with a positive return on investment that help create new jobs to make Virginia more competitive. Not only will this dramatically improve Virginia's position in the national business climate rankings, it will also positively impact both our quality of life and the state's fiscal health. To bolster Virginia's economic development competitiveness in the global marketplace, the Frederick County EDA recommends policy and budgetary actions that will support:

### A SKILLED AND AVAILABLE WORKFORCE

**Workforce Solution.** To compete with top-ranked state workforce development programs (e.g., Georgia Quick Start and Louisiana FastStart), Virginia must create a world-class, turnkey, customized workforce recruitment and training incentive program available for significant expansions of existing firms as well as substantial new business facilities. Virginia must also seek opportunities to more directly engage higher education institutions in economic development projects.

**High-demand Credential Training.** Prospects and existing businesses need higher-skilled employees, and Virginians need affordable access to attaining credentials in demand by hiring companies. The Frederick County EDA endorses additional funding for pay-for-performance attainment of high-demand credentials delivered through the Virginia Community College System. These credentials demonstrate the availability of a skilled, motivated, and plentiful workforce in the Commonwealth

### A RELIABLE AND SAFE TRANSPORTATION SYSTEM

The Frederick County Economic Development Authority fully recognizes that Frederick County must be a well-connected location. This is essential to existing and new businesses in accessing their suppliers and customers, as well as connecting to intermodal hubs leading to the global marketplace. A business will not go anywhere without easy access to well-maintained, high-capacity road networks that connect customers, distributors, and shippers. This is especially true for the manufacturing sector, a target business of the EDA. An excellent transportation network is essential for a well-functioning supply chain, as well as for the on-time delivery of goods to the marketplace. We strongly support policies to invest in infrastructure to enhance the state's competitiveness.



## **UNIVERSAL AFFORDABLE BROADBAND**

Broadband access to all parts of the Commonwealth is essential to the state's competitiveness. It drives job creation, promotes innovation, and expands markets for Virginia businesses. Too many areas, including parts of Frederick County, still lack access to this crucial resource. We urge Virginia policy makers to move forward with plans to expand deployment of broadband to all corners of Virginia in partnership with public and private providers.

## **TOOLS FOR COMPETITIVENESS**

Chief among Virginia's tools to be competitive are economic development incentives. Virginia must strengthen and grow its economic development toolbox. It is imperative that Virginia live up to the commitments it has made in the past by fully funding existing initiatives and commitments and by increasing funding to the economic development incentives that clearly deliver success for the Commonwealth. Frederick County EDA supports transparency and accountability with regard to the use and management of incentives, but such measures should not restrict the state's ability to be responsive and flexible to the needs of business.

**Virginia Business Ready Sites Program (VBRS).** Site readiness is important to Virginia's economic development efforts. Currently, Virginia has the lowest number of buildable/certified sites in the nation. Frederick County EDA supports increased funding for the VBRS program and other efforts to provide a more competitive product for those businesses looking to locate or expand in the Commonwealth.

**Commonwealth Opportunity Fund (COF).** COF remains Virginia's flagship economic development incentive program and the state's premier deal closing fund. Virginia must remain competitive to make the short list of site selection projects by increasing funding to the program

**Virginia Jobs Investment Program (VJIP).** VJIP is the most frequently-used economic development program, as it is accessible to companies of all sizes in every corner of the Commonwealth. The program provides funding and free consulting services to new and existing companies creating new jobs or experiencing technological change. This funding helps offset recruitment and training costs, thus reducing companies' human resource development expenses and reinvesting these funds in the people of Virginia.

**Virginia Economic Development Incentive Grant (VEDIG).** VEDIG is an important tool to help the Commonwealth achieve its goal to continue to attract significant headquarters, administrative or service sector operations. It should be funded at a level that allows the state to meet current commitments as well as demand by future prospects.



**Agriculture and Forestry Industries Development Fund (AFID).** AFID is a critical tool for localities to support two of Virginia’s largest industries: agriculture and forestry. This performance-based grant is made to companies that create jobs and investment, add value to Virginia-grown products, and commit to sourcing Virginia-grown products – creating additional marketplaces for Virginia’s farmers and forestland owners. The AFID program helps both rural and urban localities throughout the Commonwealth attract new and expanding businesses. It is imperative that funding for the program be maintained.

**New Economy Workforce Credential Grant.** Frederick County supports additional funding to build on the success of the Workforce Credential Grant, a pay-for-performance initiative that creates and sustains a demand-driven supply of credentialed workers to fill occupations where demand outstrips supply in Virginia. The program does this by driving increased attainment, by Virginians, of industry certifications and occupational licenses that count for jobs and business growth. The grant makes attainment of credentials in high-demand fields more affordable to Virginians through the Virginia Community College System.



DATE: May 6, 2019

TO: Board of Directors,  
Frederick County Economic Development Authority

FROM: Patrick Barker, CEcD  
Executive Director

CC: Jay Tibbs  
Deputy County Administrator

RE: Targeted Business Update

For over a decade, Frederick County has employed a target industry analysis to analytically identify the County's best fits relative to traded-sector industries – those industries that would most benefit from Frederick County's assets and be willing to expand and/or relocate to the area – and those industries that bring value to Frederick County in the form of investment, jobs, payroll and local purchasing.

This analysis serves several important roles in Frederick County's economic development efforts. Site selectors, corporate real estate leaders and representatives from the Virginia Economic Development Partnership expect communities to provide a list of targeted businesses to show a strategic direction and a proactive nature to business. Additionally, it helps community partners understand where economic development efforts will be targeted.

A brief overview of the methodology is as follows: local industry clusters are identified, along with Frederick County's average wage for those clusters, that information is then compared to the State's high growth sectors and the region's labor availability to arrive at the selected targeted industries. (Full details of methodology used to identify the targeted industries are included.)

Staff is seeking authority approval of the methodology and identification of any specific industry sectors the EDA would like examined.

# Target Industry Identification Process

## Frederick County EDA

The following process was utilized to identify target business for Frederick County.

Step 1 || Identify average annual wages for employees working in Frederick County

Step 2 || Cluster Map (LQ) and Large Employers in Frederick County


Step 3 || Discover what industry sectors in Virginia have high growth and average wages at or above Frederick County

Step 4 || Review purchasing leakage from Frederick County for current basic employers

Step 5 || Reviewed detail level data from resulting sectors via Step 3 and 4 who were identified as high growth with wages at or above Frederick County average

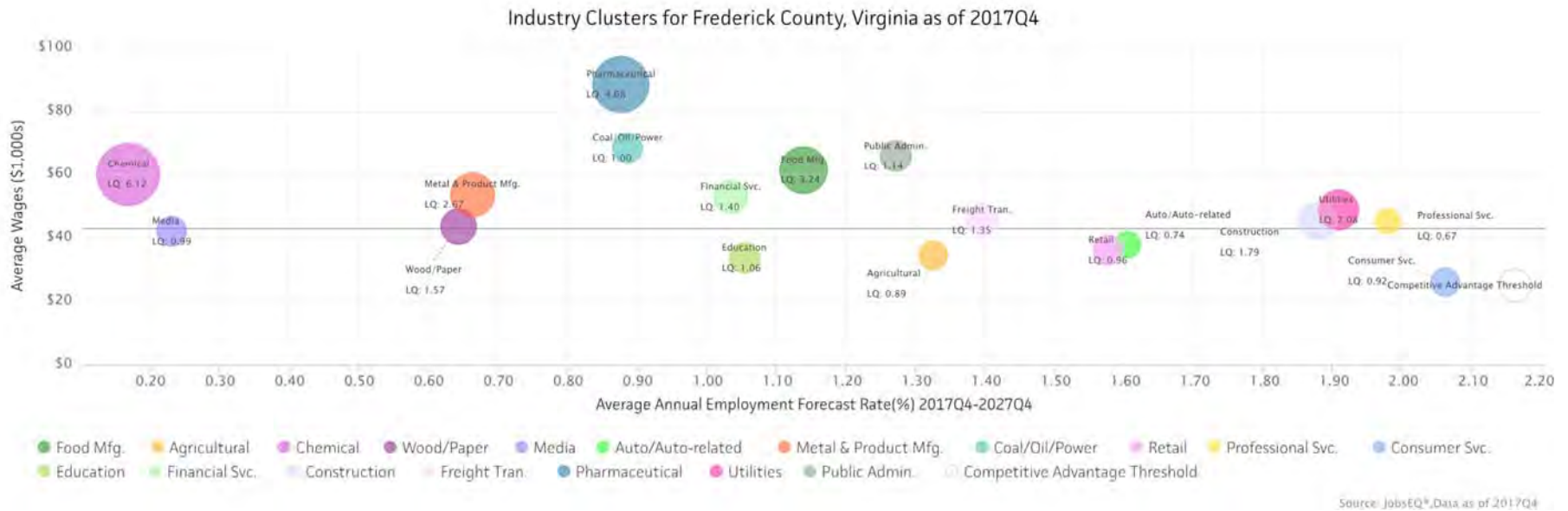
Step 6 || Conducted labor availability test for expansion of average size new business location for Virginia in the past 3 years to ensure talent exists to meet industry demand

### Step 1 || Identify average annual wages for employees working in Frederick County

NAICS	Industry	Current			5-Year History			1-Year Forecast				
		Four Quarters Ending with 2017q4			Total Change	Empl Last 'n' Years	Avg Ann % Chg in Empl	Separations (Approximate)			Growth	
		Empl	Avg Ann Wages	LQ				Empl	1   3   5	Region	Total New Demand	Exits
	Total - All Industries	33,996	\$42,898	1.00	6,234		4.1%	4,268	1,600	2,132	536	1.6%

**Result || \$42,898**

## Step 2 || Cluster Map (LQ) and Large Employers in Frederick County



### Result || Top Industry Clusters in Frederick County

1. Pharmaceuticals
2. Food Manufacturing
3. Metal & Product Manufacturing
4. Utilities
5. Wood & Paper Manufacturing
6. Freight Transportation
7. Construction
8. Financial Services

**Step 3 || Discover what industry sectors in Virginia have high growth and average wages at or above Frederick County**

- Completed at 3-digit NAICS level
- Focus on basic employers
- Filter some based on known assets
- High growth demand (total approx replacement demand + total growth demand)

Industry Snapshot in Virginia, 2017q4												
NAICS	Industry	Current			5-Year History			10-Year Forecast				
		Four Quarters Ending with 2017q4			Total Change		Avg Ann %	Separations (Approximate)			Growth	
		Empl	Avg Ann Wages	LQ	Empl	Region	Total New Demand	Exits	Transfer	Empl	Avg Ann Rate	
541	Professional, Scientific, and Technical Services	454,203	\$100,961	1.68	20,734	0.9%	494,563	156,487	262,368	75,708	1.6%	
611	Educational Services	364,062	\$44,225	1.08	-148	0.0%	373,351	167,318	180,156	25,876	0.7%	
621	Ambulatory Health Care Services	191,092	\$63,460	0.92	22,280	2.5%	235,850	88,464	96,016	51,369	2.4%	
238	Specialty Trade Contractors	149,612	\$49,805	1.03	9,991	1.4%	174,548	55,868	101,575	17,105	1.1%	
622	Hospitals	129,049	\$62,055	0.76	5,936	0.9%	107,133	49,198	52,241	5,693	0.4%	
522	Credit Intermediation and Related Activities	73,872	\$83,367	1.04	5,205	1.5%	79,678	28,270	45,901	5,506	0.7%	
922	Justice, Public Order, and Safety Activities	81,784	\$65,807	1.63	2,392	0.6%	75,976	31,892	43,063	1,021	0.1%	
441	Motor Vehicle and Parts Dealers	56,423	\$49,548	1.03	4,393	1.6%	71,770	26,784	40,692	4,295	0.7%	
551	Management of Companies and Enterprises	73,090	\$125,856	1.21	-3,127	-0.8%	71,655	25,119	42,615	3,922	0.5%	
423	Merchant Wholesalers, Durable Goods	59,900	\$78,165	0.74	1,293	0.4%	62,495	23,098	38,831	566	0.1%	
928	National Security and International Affairs	69,115	\$109,195	4.50	2,019	0.6%	59,032	22,740	35,475	817	0.1%	
531	Real Estate	52,044	\$57,870	0.96	3,005	1.2%	56,505	25,270	27,798	3,437	0.6%	
524	Insurance Carriers and Related Activities	52,413	\$75,368	0.80	10,731	4.7%	55,726	20,235	30,819	4,672	0.9%	
236	Construction of Buildings	51,014	\$59,546	0.99	5,133	2.1%	55,152	18,482	31,294	5,377	1.0%	
237	Heavy and Civil Engineering Construction	40,052	\$54,430	1.28	1,413	0.7%	51,734	15,591	27,972	8,172	1.9%	
811	Repair and Maintenance	40,593	\$44,055	1.00	1,638	0.8%	46,375	17,039	27,014	2,322	0.6%	
424	Merchant Wholesalers, Nondurable Goods	33,753	\$58,689	0.61	-122	-0.1%	37,754	14,224	22,847	682	0.2%	
484	Truck Transportation	33,629	\$49,332	0.78	1,684	1.0%	36,890	14,170	21,818	902	0.3%	
921	Executive, Legislative, and Other General Government Support	35,231	\$52,442	0.44	2,783	1.7%	34,076	14,609	19,043	424	0.1%	
926	Administration of Economic Programs	31,919	\$87,105	2.04	-579	-0.4%	28,565	11,792	16,609	164	0.1%	
999	Unclassified	19,144	\$46,149	2.20	14,645	33.6%	27,781	10,026	13,698	4,056	1.9%	
488	Support Activities for Transportation	22,047	\$56,043	1.04	3,320	3.3%	26,825	9,391	14,802	2,631	1.1%	
425	Wholesale Electronic Markets and Agents and Brokers	19,980	\$112,112	0.82	-1,396	-1.3%	26,293	8,389	14,096	3,808	1.8%	
711	Performing Arts, Spectator Sports, and Related Industries	15,860	\$44,260	0.71	544	0.7%	19,954	8,722	10,081	1,151	0.7%	
221	Utilities	18,539	\$88,411	0.85	102	0.1%	17,376	6,121	10,795	460	0.2%	
481	Air Transportation	13,868	\$81,654	1.05	115	0.2%	15,935	5,791	8,832	1,312	0.9%	
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	14,900	\$157,047	0.56	1,965	2.9%	15,602	4,765	9,057	1,779	1.1%	
519	Other Information Services	9,966	\$63,824	0.85	1,028	2.2%	15,136	3,775	6,954	4,408	3.7%	
562	Waste Management and Remediation Services	11,487	\$48,960	0.95	438	0.8%	14,401	4,917	8,164	1,319	1.1%	
532	Rental and Leasing Services	12,306	\$44,651	0.80	228	0.4%	14,042	5,514	8,308	220	0.2%	
518	Data Processing, Hosting, and Related Services	12,181	\$117,780	1.36	1,334	2.3%	12,920	3,742	7,360	1,818	1.4%	
924	Administration of Environmental Quality Programs	8,716	\$73,934	1.02	-115	-0.3%	7,930	3,251	4,613	66	0.1%	
925	Administration of Housing Programs, Urban Planning, and Community Development	3,682	\$54,279	1.49	-423	-2.2%	3,564	1,507	1,991	66	0.2%	

Result || Top Sectors in Virginia with High Growth and Wages above Frederick County's average

1. Professional, Scientific, And Technical Services
2. Administrative and Support Services
3. Credit Intermediation and Related Services
4. Other Information Services
5. Management of Companies and Enterprises
6. Support Activities for Transportation
7. Data Processing, Hosting and Related Activities
8. Truck Transportation

**Step 4 || Review purchasing leakage from Frederick County for current basic employers**

Buyer Industry: Manufacturing (31) in Frederick County, Virginia

NAICS	Supplier Industries	Purchases from US Firms	Purchases from In-Region Firms	Purchases from Out-of-Region Firms	Total Supplier Employment (In-Region)	Supplier Location Quotient (In-Region)	% In-Region Purchases
112000	Animal Production (Proprietors)	\$97,342,000	\$378,000	\$96,964,000	4	0.04	0%
112120	Dairy Cattle and Milk Production	\$82,803,000	\$0	\$82,803,000	0	0.00	0%
551114	Corporate, Subsidiary, and Regional Managing Offices	\$91,139,000	\$24,995,000	\$66,144,000	346	0.72	27%
324110	Petroleum Refineries	\$63,908,000	\$0	\$63,908,000	0	0.00	0%
425120	Wholesale Trade Agents and Brokers	\$41,155,000	\$1,788,000	\$39,367,000	45	0.23	4%
325211	Plastics Material and Resin Manufacturing	\$61,362,000	\$24,738,000	\$36,624,000	27	2.15	40%
311119	Other Animal Food Manufacturing	\$30,757,000	\$736,000	\$30,021,000	37	4.85	2%
325199	All Other Basic Organic Chemical Manufacturing	\$26,920,000	\$0	\$26,920,000	0	0.01	0%
484121	General Freight Trucking, Long-Distance, Truckload	\$33,078,000	\$7,984,000	\$25,094,000	165	1.28	24%

**Results || Top Findings**

- \$82 million out-of region (OORP) purchases on dairy cattle and milk production
- Estimated \$30 million out of region purchases for trucking (specialized, general, long and short distance)
- \$66 million OORP for corporate, subsidiary and regional managing offices
- \$15 million OORP Data Processing & Hosting
- Crude Petroleum, Refineries, Resin Manufacturing, and Utilities have high OORP but do not “fit” for Frederick County
- These results are for manufacturing buyers only



Step 5 || Reviewed detail level data from resulting sectors via Step 3 and 4 who were identified as high growth with wages at or above Frederick County average to discover specific targeted sectors.

Industry Snapshot of Professional, Scientific, and Technical Services in Virginia												
NAICS	Industry	Current			Total Change over the Last 5 Years	Historical			Forecast			
		Four Quarters Ending with 2017q1				Average Annual % Change in Employment 2012q1-2017q1			Over the Next 10 Years			
		Employment	Avg. Annual Wages	Location Quotient	Employment	Virginia	Virginia	USA	Total Approx Repl Demand	Total Growth Demand	Avg. Annual Growth Percent	
541512	Computer Systems Design Services	107,884	\$118,007	4.11	10,309	2.0%	2.0%	5.3%	21,005	26,585	2.2%	
541611	Administrative Management and General Management Consulting Services	41,684	\$108,187	2.34	5,452	2.8%	2.8%	5.9%	9,608	11,602	2.5%	
541511	Custom Computer Programming Services	41,748	\$114,053	1.73	2,764	1.4%	1.4%	4.8%	8,170	10,813	2.3%	
541330	Engineering Services	50,705	\$99,916	1.87	-5,134	-1.9%	-1.9%	1.1%	11,712	4,907	0.9%	
541614	Process, Physical Distribution, and Logistics Consulting Services	13,325	\$104,607	3.95	-2,342	-3.2%	-3.2%	3.8%	3,050	3,479	2.3%	
541690	Other Scientific and Technical Consulting Services	9,217	\$102,422	1.52	632	1.4%	1.4%	1.1%	2,125	2,567	2.5%	
541519	Other Computer Related Services	8,677	\$113,259	2.71	634	1.5%	1.5%	0.4%	1,700	2,270	2.4%	
541990	All Other Professional, Scientific, and Technical Services	14,725	\$79,740	1.40	2,725	4.2%	4.2%	2.7%	3,124	1,954	1.3%	
541613	Marketing Consulting Services	6,112	\$81,635	0.80	1,074	3.9%	3.9%	6.3%	1,406	1,667	2.4%	
541618	Other Management Consulting Services	5,862	\$115,038	2.03	187	0.7%	0.7%	1.4%	1,344	1,548	2.4%	
541712	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	19,098	\$111,752	1.50	-5,073	-4.6%	-4.6%	0.8%	4,414	1,465	0.7%	
541940	Veterinary Services	12,284	\$38,215	1.26	1,548	2.7%	2.7%	3.7%	2,561	1,152	0.9%	
541513	Computer Facilities Management Services	4,707	\$68,489	2.41	-71	-0.3%	-0.3%	4.7%	914	1,131	2.2%	
541620	Environmental Consulting Services	4,169	\$88,757	1.65	-178	-0.8%	-0.8%	0.7%	958	1,129	2.4%	
541612	Human Resources Consulting Services	2,784	\$94,209	1.18	85	0.6%	0.6%	0.3%	644	794	2.5%	
541211	Offices of Certified Public Accountants	20,242	\$104,400	1.58	3,103	3.4%	3.4%	3.1%	4,734	650	0.3%	
541219	Other Accounting Services	12,843	\$63,679	1.41	625	1.0%	1.0%	1.6%	3,022	579	0.4%	
541930	Translation and Interpretation Services	2,240	\$66,377	1.64	297	2.9%	2.9%	5.5%	478	334	1.4%	
541910	Marketing Research and Public Opinion Polling	2,163	\$67,784	0.74	63	0.6%	0.6%	-0.7%	460	301	1.3%	

- Reviewed 6-digit NAICS for those 3-digit sectors identified as high growth with wages at or above Frederick County average

## Results || Specific Target Sectors

1. Food Manufacturing
  - Speciality manufacturing
  - Fluid milk manufacturing
  - Coffee and tea manufacturing
  - Miscellaneous foods
  - Breweries
  - Dry Pasta/Flour Mix manufacturing
2. Plastic and Rubber Manufacturing
  - Laminated Plastics Plate, Sheet (except Packaging), and Shape Manufacturing
  - Plastics Bottle Manufacturing
  - Miscellaneous Plastic and Rubber Manufacturing
3. Metal Manufacturing
  - Machine shops
  - Metal Can Manufacturing
  - Fabricated Structural Metal Manufacturing
4. In-Vitro Diagnostic Substance Manufacturing
5. Professional, Scientific, Technology
  - Computer system design
  - Administrative management and general management consulting services
  - Customer computer programming
  - Engineering services
  - Physical distribution and logistics consulting services
  - R&D in the physical, engineering and life sciences
6. Administration and Support Services
  - Office and administrative support services
  - Professional employer organizations
7. Credit Card Issuing
8. Other Support Activities for Road Transportation

**Step 6 || Conducted labor availability test for expansion of average size new business location for Virginia in the past 3 years to ensure talent exists to meet industry demand**

What-If Report for FredVA\_Draw45miles, NAICS 5415 - Computer Systems Design and Related Services

SOC	Title	New Employer Demand	Empl (Place of Residence) <sup>1</sup>	Unempl <sup>1</sup>	Regional Avg Wage <sup>2</sup>	National Avg Wage <sup>2</sup>	Empl Extended	Unempl Extended	Potential Candidate / Opening Ratio
15-1132	Software Developers, Applications	15	1,809	34	\$99,400	\$104,300	6,026	132	123
15-1121	Computer Systems Analysts	9	1,492	31	\$85,800	\$91,600	3,597	82	169
15-1151	Computer User Support Specialists	7	1,453	65	\$53,600	\$53,100	901	39	217
15-1133	Software Developers, Systems Software	7	1,328	26	\$104,900	\$110,600	8,575	182	193
15-1131	Computer Programmers	6	639	21	\$81,700	\$85,200	2,203	49	110
11-3021	Computer and Information Systems Managers	4	940	17	\$134,800	\$145,700	3,693	85	239
15-1142	Network and Computer Systems Administrators	4	1,174	15	\$90,100	\$94,500	3,662	72	297
15-1199	Computer Occupations, All Other	3	1,369	39	\$97,200	\$98,900	9,124	230	470
11-1021	General and Operations Managers	3	5,404	92	\$112,900	\$122,100	12,952	196	1,832
41-3099	Sales Representatives, Services, All Other	3	2,269	56	\$61,700	\$63,100	n/a	n/a	775
15-1143	Computer Network Architects	2	588	5	\$96,900	\$104,200	8,220	188	287
15-1152	Computer Network Support Specialists	2	807	25	\$59,300	\$67,800	n/a	n/a	316
43-4051	Customer Service Representatives	2	6,245	268	\$33,500	\$35,200	5,925	288	3,256
13-1111	Management Analysts	2	2,746	83	\$88,300	\$91,900	5,255	138	1,415
11-9199	Managers, All Other	2	2,859	17	\$108,500	\$112,200	7,510	190	1,338
13-1161	Market Research Analysts and Marketing Specialists	2	1,183	30	\$59,400	\$70,600	2,120	48	607
43-9061	Office Clerks, General	2	6,499	285	\$31,400	\$33,000	6,412	258	3,387

- a. Labor availability tested for each of the sectors from Step 5
- b. Average size of new business location for Virginia last 3 years = 50
  - i. 100 employee operation used for analysis to be conservative

## Results || Targets

### **Advanced Manufacturing**

- \*Plastics Products
- \*Engineered Wood Products
- \*Fabricated Metal
- \*BioScience
- \*Supportive Logistic Consulting
- \*Supportive Trucking Operations

### **Headquarters and Back Office**

- \*Corporate Headquarters
- \*Back Office
- \*Service Centers

### **Retail**

- \*Specialty Retailers
- \*Casual Dining and Fast Casual Restaurants

### **Professional and Creative Services**

- \*Information and Communication Technology
- \*Data Centers
- \*Cyber Security
- \*Engineering

### **Food Processing and Agribusiness**

- \*Specialty foods and beverages
- \*Packaged Foods
- \*Perishable Foods
- \*Beverages and Breweries

Note || If an existing business was not on the list at the end of the study then it was added back in to show commitment to the sector