

Community Assessment for

Bartow County, Georgia

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CONTENTS

Situation	1
Observations	
Area Overview	2
Transportation.....	3
Workforce.....	3
Services and Intangibles	4
Industrial Development	5
Government and Leadership	6
Regional Labor and Economic Profile	7
Recommendations	
Overview	13
Strategy.....	14
Marketing.....	17
Leadership	18
 APPENDIX	
Methodology	

SITUATION

- Georgia Power Company (GPC) is a significant investor in economic development efforts across Georgia. GPC is the largest electrical utility in the state and is a subsidiary of Southern Company, a major utility holding company that spans the southeastern United States. GPC provides a number of services that directly support economic development activities in the areas they serve. These include community development (economic development preparedness), industrial park planning (conceptual master planning and utilities assessments), and site selection services (GPC works directly with companies, consultants and economic development allies to attract investment to Georgia). The Georgia Resource Center, located in Atlanta, provides state-of-the-art information on Georgia and her communities.
- CH2M HILL Lockwood Greene (CHLG) is a \$4 Billion engineering, design, construction management and consulting firm with 16,000 employees worldwide. CH2M HILL has traditional strong capabilities in design, construction and operation of water/wastewater treatment facilities and in environmental permitting across the globe.
- CHLG provides site selection services across a broad diversity of industries that align with our overall corporate objectives. In this role, CHLG establishes criteria, conducts feasibility assessments and implements site searches. CHLG has managed recent siting projects in the biotech, chemicals, aviation, general manufacturing and power industries. Our consulting business also provides lean enterprise consulting to firms interested in process redesign. Based on CHLG experience, GPC has engaged CHLG to conduct community assessments. Moran, Stahl and Boyer (MS&B), a business location consulting firm, is a sub-consultant to CHLG on this project. CHLG and MS&B have worked together on projects in the past. MS&B is primarily responsible for the regional labor and economic profile.
- These assessments are based on CHLG site selection expertise and on input from the local community. There are several analytical steps which will be used to support and refine the findings from our field visit and research into each community. For this exercise, GPC selected the following counties in Georgia for review: Bartow, Clayton, Cook, Glynn, Morgan, Muscogee and Richmond. The objective of the analysis is to provide overall recommendations to the counties that would support economic development. This report focuses on Bartow County.



A AREA OVERVIEW

- **Major Employers:** Bartow County and the City of Cartersville benefit from the presence of major industrial and other employers that have supported the local economy over the years. Anheuser-Busch, Trinity Rail Operations and Shaw Industries are three significantly large employers in the area. The recent addition of Toyo adds to the diversity and shows the commitment the region has in industry recruitment. All of these industries generate sizeable revenue for the local economy and represent a diverse grouping of industry segments. Having several employers of this magnitude is not typically common in a region the size of Bartow County; however, the relative location to Atlanta makes this occurrence more common and expected.
- **Proximity to Atlanta:** Bartow County's proximity to the Atlanta metropolitan area has mixed effects. The fact that 70% of the Bartow County workforce resides in the county is excellent and speaks volumes to the quality of life and offerings of Bartow County. The close proximity to Atlanta creates additional employment and quality of life options for those choosing to commute either to or from Atlanta to Bartow County. The location also creates environmental issues and heavy demands on local infrastructure due to rapid growth and high vehicle traffic associated with the growth and the proximity to Atlanta.
- **Light manufacturing:** There are a few small to mid-size light manufacturing industries in the area. The potential for other light manufacturing exists and can be drawn from the Machinery and Equipment Manufacturing as well as the Electronics and Electrical Component Manufacturing Clusters identified later in this report. Based on CHLG's review of the region, there are ample industrial sites to support these industries.
- **Distribution:** Despite the transportation offerings of rail, interstate and highway, the County has little in the way of distribution and warehousing facilities. The region is very cautious about entering into this market segment since the market typically offers lower than average wage rates and could cause additional traffic congestion.
- **Expansion Activities and Plant Closures:** Minimal expansion activity occurred in 2005. Due to large plant closures such as Glad Manufacturing and Unilever, based on information provided in the project RFI, the expansion was not enough to offset the loss of jobs. These types of local corporate changes, both expansion and facility closures, will be closely evaluated by site selection consultants and others as they are sometimes an indicator of the local business environment, depending on the industry and the circumstances.

OBSERVATIONS

T RANSPORTATION

- **RAIL:** CSX Transportation provides extensive rail service with three yards serving the Cartersville area, including a 100 car switching yard.



- **I-75:** Bartow County is bisected by Interstate 75. This is a very important asset to the community. Proximity of I-75 to the rail yard has the potential to create additional synergies. Improvement projects are ongoing on I-75 in the region of Cartersville. This will create more opportunities and may attract more distribution centers.
- **Airport:** The Hartsfield-Jackson Atlanta International Airport services Bartow County. The Cartersville-Bartow County Airport is a public facility capable of serving corporate jets. The Cartersville-Bartow County Airport has a new and very attractive terminal, which makes a good impression on visitors.



- **Local Traffic:** Many interviewees commented on the local traffic congestion in the area. This is a problem faced by many growing regions, and continued progress in this area is extremely important to the success of Bartow County's economic development initiatives and quality of life offerings.

W ORKFORCE

Bartow County has access to a regional labor force of approximately 40,000 with an extended 7-county laborshed of greater than 600,000. Cartersville-Bartow County Department of Economic Development notes 69% of the workforce lives and works within Bartow County, and 90% of the CEOs live in the community. Interviews with local employers confirmed many of the workers commute from surrounding counties, and Georgia's Quick Start program is valuable in preparing workers for jobs with customized training. However, several problems exist, especially at the blue-collar level, including:

- **Workplace Readiness:** Employers interviewed stated the K-12 systems of the City, County and the surrounding area are not providing adequate preparation of the local youth for the available jobs. Some employers commented more needs to be done with pre-employment and on-the-job training. Job preparation and basic employment courses in the high school curriculum were desired. Course suggestions from local employers include timeliness, high productivity, loyalty and customer service.

OBSERVATIONS

This issue is present all across the country and Bartow County must address this problem to improve the situation. Although the Quick Start Program helps close the gap, it should not be the only means of addressing this problem.

- **Aging Workforce:** Several of the local plant managers and recruiting staff commented a growing concern is the average age of the employees. Not enough new and young workers are entering the workforce in the area to allow for proper training and “passing on of the facility knowledge.” Local businesses expressed numerous times the need for highly trained technical people that are young and willing to commit to the area and a career.

SERVICES AND INTANGIBLES

- **K-12 Education:** Bartow County, like many areas across Georgia, struggles with high school dropout rates. Based on the interviews, there is a perception starting to form about differences in the City schools versus the County. Although this is typical throughout the country, having great schools throughout the community removes limitations on where people live. This allows people to spread out within the community and promotes development countywide and regionally. There is an increased Hispanic population entering the Bartow region. This is an ever increasing dynamic all across the Country. A plan will be required to address the dynamics associated with this emerging population for the good of the community, and the educational system should be included in the plan.
- **Higher and Technical Education:** The presence of Georgia Highlands College in Cartersville, and North Metro Technical College and Kennesaw State University within 15 miles from downtown Cartersville are true assets for the community. Many communities can boast only a two-year technical college without the ability to leverage the close proximity to a State University and Technical College. Although these higher and technical education assets exist, a comment repeated multiple times is education is lacking, and it was strongly suggested that the area needs more technically trained individuals. The plant managers meeting that is conducted is an excellent way to align with the interests and needs of the local employers.
- **Regional Hub for Retail and Healthcare Services:** Bartow County’s retail and healthcare sectors are serving as a regional hub for surrounding smaller communities and rural areas. Cartersville Medical Center/HCA serves Bartow County and the surrounding region. In addition to offering an ER, ICU and other types of care that are expected by people locating to a community like Bartow County, the hospital offers advanced cancer treatment. This further shows Cartersville Medical



OBSERVATIONS

Center/HCA is progressively keeping up with the demands the healthcare industry is facing. The retail sector is growing, especially near the north end of town and several new restaurants have opened.

- **Quality of Life:** Bartow County offers the charm of a small town environment with the luxuries of a growing concentration of locally available amenities. The climate is very favorable for those looking to escape harsh winters and have a moderate climate with the daily average above 60 degrees. The parks and recreational offerings of Bartow County are significant regional assets. They promote leisurely activities and further enhance the quality of life enjoyed by the citizens in the region. Red Top Mountain State Park on Lake Allatoona and world-renowned Barnsley Gardens are utilized by the community and promote some tourism in the area. Other attractions include the *Booth Western Art Museum* and various other museums and historical areas scattered throughout the area.



INDUSTRIAL DEVELOPMENT

Cartersville-Bartow County Department of Economic Development (CBCDED) is the lead agency for economic development in Cartersville-Bartow County, and is a Joint Development Authority as provided in an intergovernmental agreement between the City of Cartersville and Bartow County. As such, this entity is responsible for supporting, growing and maintaining the tax base in the County. To achieve this, the development authority has the responsibility for acquiring, constructing, equipping, maintaining, and operating projects in order to influence economic development. A critical aspect to economic development is ensuring a broad diversity of buildings and sites exists within the region to ensure any specific need can be met from an existing company and a company from outside of the region. The CBCDED has what appears to be an adequate bank of industrial property to market. The properties include:

- **Cartersville-Bartow County Corporate Park** - This is a relatively new park with 846 developable acres.
- **Cartersville West Industrial Park** - 116 acres remains in this 547 acre park zoned heavy industrial. The park is convenient to an I-75 interchange, has rail access and is adjacent to the Cartersville/Bartow County Airport. Infrastructure appears to be adequate to support most any industry interested in the site.
- **Georgia North Industrial Park:** While CHLG was unable to visit this park in Adairsville, we understand the park is almost completely built-out with only 60 acres remaining. Existing industry includes a sheet metal fabricator, compaction roller manufacturer, diesel engine manufacturer and a distribution warehouse.

OBSERVATIONS

- **Adairsville Industrial Park:** CHLG was unable to visit this 178 acre park located in Adairsville. The park is completely built out and includes industries such as carpet manufacturing, wood products manufacturing, concrete product manufacturing and distribution.
- **CSX Industrial Park:** This is roughly a 1000 acre park, and is significantly tied to the operations of CSX Railroad. The park is largely built out with only about 15 acres remaining. The park is the location of several of the area's major employers including Trinity Rail, Gerdau Ameristeel, and Graham Packaging.

GOVERNMENT AND LEADERSHIP

- **Form of Government:** Currently, Bartow County has a sole county Commissioner. Very soon, the issue of multiple districts in the County with elected representative commissioners will be coming to vote, and this has raised considerable discussion and debate in the County. The City of Cartersville has an elected mayor and six council members. In the 2005 Citizen Survey completed by The National Research Center, Inc., Cartersville citizens said they were relatively satisfied with the local government as far as value for taxes paid, overall direction, and the feeling the city government listened to their issues. Compared to other communities, Cartersville ranks either about the same or above the norm in these areas.
- **Leadership:** There appears to be a mix of new and veteran leadership focusing on economic development. Just two years ago, a Joint Development Authority was formed between Bartow County and The City of Cartersville. The leadership in Bartow County expresses confidence and appears to be organized and focused on tackling the larger issues facing Bartow County including job development, traffic and education. The leadership grasps the concept of regionalism, realizes the local government plays a key role in economic development and understands regionalism is critical to economic development success.
- **Agencies Promoting Development:** It is CHLG's observation that the different organizations involved in economic development appear to work well together. This is true for a wide spectrum of players, from the CBCDED and the Chamber of Commerce to local governments, the educational institutions and the utilities. Everyone wears several hats doing what it takes to get the job done while trying to avoid duplication through the definition of roles. A prime example of the community pulling together is evident in the recent recruitment of Toyo.

"...organizations involved in economic development appear to work well together..."

REGIONAL LABOR AND ECONOMIC PROFILE

SUMMARY

- Growth within the Bartow County region continues to expand at a strong pace, particularly in terms of population growth. Net migration of new residents into the area remains strong and the area's population is growing nearly three times as fast as the national average.
- Given the high number of residents commuting towards Atlanta every day for work, employers locating along I-75 have an opportunity to intercept some of these employees.
- The Bartow County region maintains lower educational attainment levels than national averages at the high school, bachelor and graduate level. While the area is behind national averages for university graduates, local employers can recruit from several universities in surrounding areas, including Atlanta (includes Kennesaw State University located in Cobb County), Athens, Dalton and Chattanooga.
- The area maintains several favorable quality of life factors, including climate, safety, cost of living, cost of housing, and natural disaster ratings. Given the close proximity to large employment centers in metro Atlanta, the area rates well in terms of the ability to recruit executives and professionals. The region rates lower (compared to national averages) in measures of cultural opportunities, recreation/spectator sports and healthcare availability. However, many of these services are accessible in nearby Atlanta and Chattanooga. Education quality is lower than national averages, but the overall quality is considered better than several other parts of Georgia. (See page 10 for more detail.)
- Labor costs continue to remain below national averages and the overall cost of doing business is considered competitive.
- Regional employment is highly concentrated in manufacturing and construction. The area lags behind national averages in employment in finance/insurance/real estate, professional and business services, and education and healthcare services. However, future growth in these industries is expected to be stronger than in manufacturing.

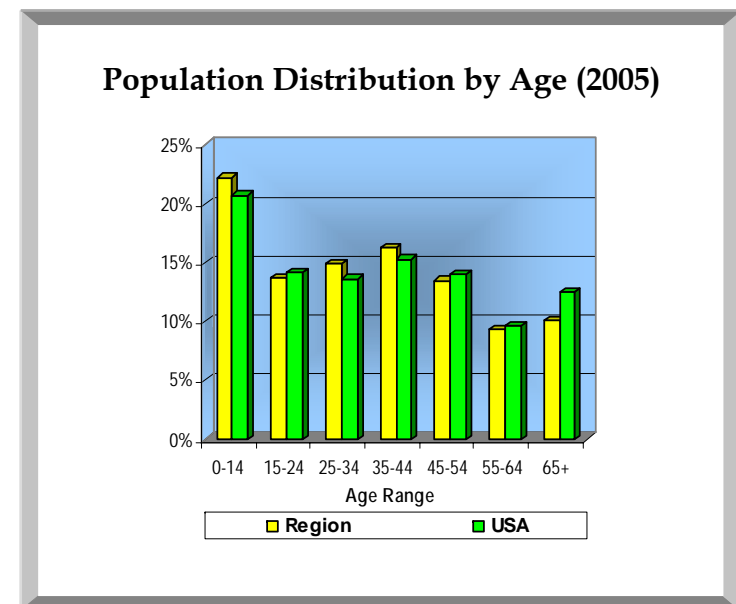
REGIONAL LABOR AND ECONOMIC PROFILE

WORKFORCE

- The Bartow County region, located between Atlanta and Chattanooga along the busy I-75 corridor, continues to attract large numbers of new residents. While migration has slowed somewhat in recent years, net migration of new residents is still considered very strong, particularly on a per capita basis.
- Population growth is expected to remain very strong over the next five years (three times as fast as the national population growth rate), fueling demand for housing, retail, education and healthcare services.
- Regional income levels are ~23% higher than the national average, with higher income levels generally observed closer to the Atlanta metropolitan area.
- The area's median age is slightly below the national average.
- Age distribution is similar to national patterns. Slightly higher percentages of the population are reported in younger age cohorts (0-14, 25-34 and 35-44) compared to older age cohorts.

Regional Population Statistics*	
Regional Population (2005)	486,633
5-Year Growth	15.0%
Avg. Annual Net Migration (2000-2004)	8,755
Median Age (2005)	34
Median Household Income (2005)	\$51,148

*Bartow County Region defined as Bartow, Cherokee, Floyd, Gordon, Pickens, and Polk counties in GA



REGIONAL LABOR AND ECONOMIC PROFILE

WORKFORCE

- The region lags behind measures of educational attainment when compared to national averages (81%, 25% and 9% of the U.S. population with at least a High School, Bachelor or Master Degree respectively).
- Raising educational attainment levels in the area should be a continued focus for local leadership.

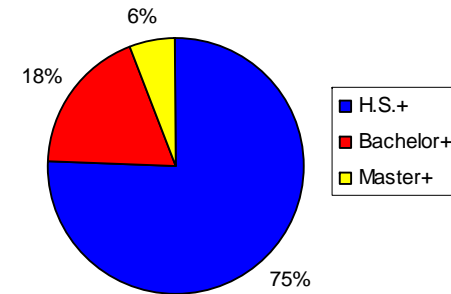
Regional Employment

Civilian Labor Force (2005)	247,908
Labor Force Participation Rate (2004)	68.9%
Employment (2005)	236,502
MS&B Labor Recruitability Rating*	Second Tier

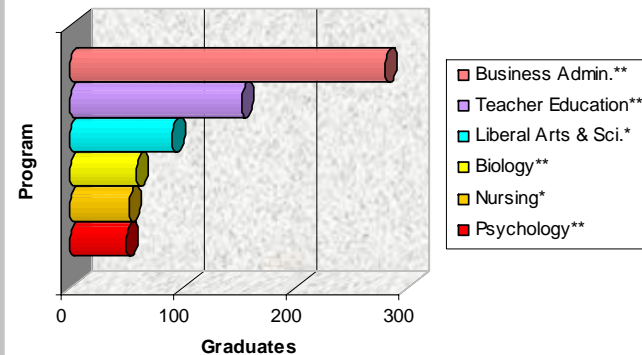
*Out of five possible tiers: 1st tier most favorable

- On the surface, the area's quality of life appears to offer a mixed bag of opportunities for recruiting professionals and executives (favorable climate, safety and natural disaster ratings). While the area reports lower ratings for cultural opportunities, recreation/spectator sports and healthcare availability, proximity to Atlanta and Chattanooga helps mitigate these challenges to some extent.
- Even though the unemployment rate has increased since 2000 (up 1.5 percentage points), the 2005 unemployment rate remains well below the national average (4.6% compared to 5.1% for the U.S.).
- Output of graduates at all levels within the study region is behind national averages. However, many companies hire graduates from surrounding schools in Atlanta (including Cobb County), Athens and Chattanooga.
- Within the Bartow County region, high levels of graduates are reported in business administration (bachelor), education (bachelor) and liberal arts (associate). Biology and nursing are also popular degree programs.

Educational Attainment (2005)
(% of population aged 25+ with at least a high school, bachelor or master degree)



Popular Degree Programs (2004)



REGIONAL LABOR AND ECONOMIC PROFILE

QUALITY OF LIFE AND COST MEASURES

<i>Quality of Life Ratings*</i>	
Cultural Opportunities (max=100)	37
Recreation/Spectator Sports (U.S. Avg.=100)	42
Climate (U.S. Avg.=100)	101
Safety (U.S. Avg.=100)	58
Healthcare Availability (U.S. Avg.=100)	51
Education Quality (U.S. Avg.=100)	82
Cost of Living Index (U.S. Avg.=100)	95
Cost of Housing Index (U.S. Avg.=100)	94
Traffic Congestion (100=low congestion)	117
Air Quality	Bartow and Cherokee Counties in marginal nonattainment
Natural Disaster Rating**	33

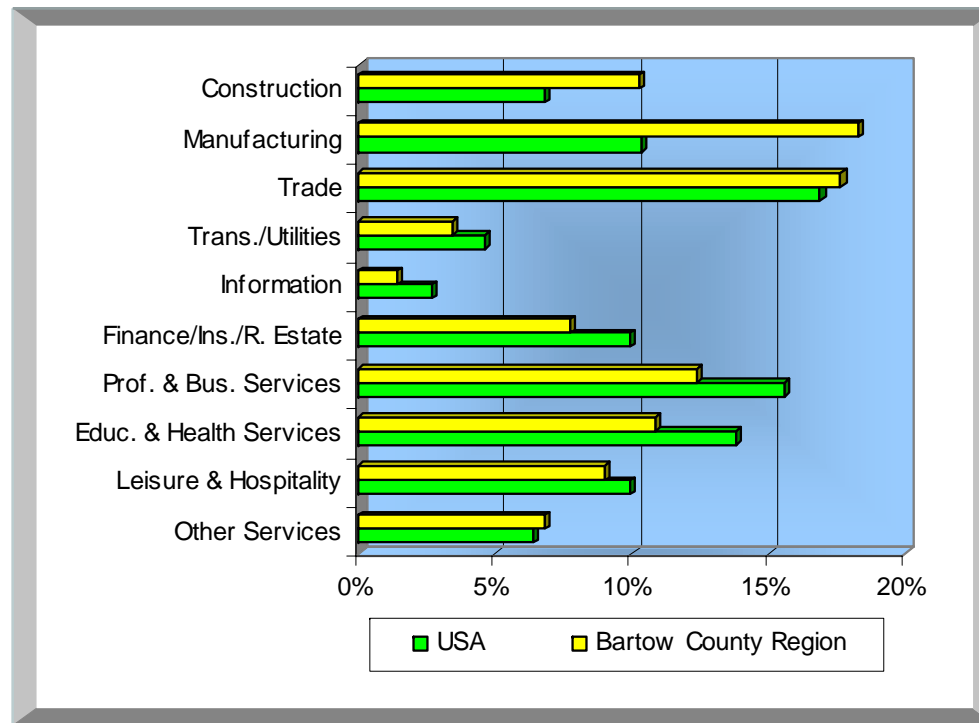
*Ratings in key quality of life measures deemed most critical to recruiting employees

**Lower index=lower possibility of disruptions due to natural disasters (maximum index = 100)

- The Bartow County area maintains favorable climate, safety, cost of living, cost of housing, and natural disaster ratings.
- The region struggles in measures of cultural opportunities, recreation/spectator sports, healthcare availability (although many of these services are found in nearby Atlanta and Chattanooga) and education quality (however, quality is considered better than several other parts of Georgia).
- Quality of Life ratings are developed by Moran, Stahl & Boyer by comparing key regional statistics with national averages (see Appendix for data source and methodology details).

REGIONAL LABOR AND ECONOMIC PROFILE

EMPLOYMENT SEGMENTATION



- Manufacturing continues to be an important employment segment within the region. Nearly twice as many of Bartow County region residents are employed in manufacturing compared to the national average. Employment in construction is also particularly high within the area.
- Greater employment growth is forecast to occur in professional and business services, finance/insurance/real estate, transportation and construction when compared to manufacturing (5%-6% growth compared to 1% growth in manufacturing over the next five years).

REGIONAL LABOR AND ECONOMIC PROFILE

BUSINESS COSTS

Cost of Doing Business	
Overall Cost of Doing Business Index*:	91.1
Overall Labor Cost Index*:	95.4
<i>Labor Cost Index for Key Industry Groups*</i>	
General Manufacturing	94.9
Chemicals / Plastics Manufacturing	96.0
Electronics and Electrical Component Manufacturing	95.6
Automotive / Transportation Manufacturing	95.7
Warehousing / Distribution	93.3

*100=National Average (Overall CODB Index includes labor costs, real estate costs, state/local taxes and utilities)

- The overall cost of doing business, including labor costs, is approximately 9% lower than the national average.
- Manufacturing labor costs are generally 5%-6% less than the national average, while warehouse and distribution labor costs are slightly lower.
- The area's low cost of doing business is considered favorable not only for local employers, but also for many other companies considering a relocation or expansion (particularly from higher cost locations in the West and Northeast).

RECOMMENDATIONS

OVERVIEW ASSESSMENT (STRATEGY, MARKETING, LEADERSHIP)



RECOMMENDATIONS

S TRATEGY

- **Target Areas for Economic Development:** Based on what we have observed in this assessment, the Bartow County Development Authority should consider the following target industries:
 - *Small – Medium Sized Manufacturing:* The community has a strong history in manufacturing, with a skilled workforce and educational assets available to help continue with technical education required for these types of industries. The Quick Start Program is also an advantage since the state will ensure a company gets employees properly trained to meet their needs. These small to mid sized manufacturing facilities would be excellent choices for industrial sites located within the city limits.
 - *Heavy Manufacturing:* With Bartow County’s history in manufacturing and the location of Cartersville-Bartow County Corporate Park, the two lend to the possibility of locating a heavy manufacturer to the area. Issues such as non-attainment will have to be considered as well as community perceptions.

Chemicals and Plastics Manufacturing

5-Digit NAICS Industry	Industry Description
32614	Polystyrene Foam Product Manufacturing
32616	Plastics Bottle Manufacturing
32619	Other Plastics Product Manufacturing
32622	Rubber and Plastics Hoses and Belting Manufacturing

RECOMMENDATIONS

Machinery and Equipment Manufacturing

5-Digit NAICS Industry	Industry Description
33312	Construction Machinery Manufacturing
33329	Other Industrial Machinery Manufacturing
33331	Commercial and Service Industry Machinery Manufacturing
33351	Metalworking Machinery Manufacturing
33361	Engine, Turbine, and Power Transmission Equipment Manufacturing
33392	Material Handling Equipment Manufacturing
33399	All Other General Purpose Machinery Manufacturing

Electronics and Electrical Component Manufacturing

5-Digit NAICS Industry	Industry Description
33421	Telephone Apparatus Manufacturing
33531	Electrical Equipment Manufacturing
33599	All Other Electrical Equipment and Component Manufacturing

Automotive/Transportation

5-Digit NAICS Industry	Industry Description
33611	Automobile and Light Duty Motor Vehicle Manufacturing
33631	Motor Vehicle Gasoline Engine and Engine Parts Manufacturing
33633	Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing
33635	Motor Vehicle Transmission and Power Train Parts Manufacturing
33639	Other Motor Vehicle Parts Manufacturing
33651	Railroad Rolling Stock Manufacturing

NOTE: We recommend the county further refine these industries as to their siting criteria, community fit and other factors.

RECOMMENDATIONS

S TRATEGY

- *Warehousing and Distribution:* It is recommended that the area be prepared for this type of industry and perform an analysis to determine the most appropriate siting of warehousing and distribution in the region. Bartow County is conveniently located and accessible by the interstate and rail, making it well positioned to naturally attract the warehousing and distribution sector. For this reason, Bartow County is likely to be subjected to continuous inquiries from this sector. Bartow County can benefit by the number of jobs the industry could bring, especially if it is done without compromising the infrastructure. It is understood that Bartow County has had a history of fairly strong paying jobs and is reluctant to enter into the warehousing and distribution sector mostly due to concerns related to the potential stress the industry can cause on the infrastructure. Being prepared with the results of the recommended analysis will help Bartow County determine the best location within the community for this sector, should a strong prospect come forward. The presence of CSX railroad, along with the vast amount of open land available in the community, opens the door to the possibility of intermodal facilities, but additional studies will be required to determine the true feasibility. The presence of such operations could provide tax revenue to the base economy.
- *Retail and Restaurants:* Formal studies should be performed to determine the need of additional sit down eating establishments and community retail centers with clothing and linens stores. Relative proximity to other major retail areas is available, but it is important to note if people are leaving the area to shop, there is a loss of tax revenue to these areas.
- **World Class Spec Buildings:** CHLG recommends Cartersville-Bartow County investigate the feasibility of financing the development of a spec building to attract interest to the region. Eighty percent (80%) of site searches begin with the search for an available building. The authority may want to consider designing a building with great flexibility, setting the area apart and providing marketing impetus to the economic development efforts. Currently, there is not a spec building meeting the most common search criteria including 40,000 to 80,000 sqft with ceiling heights at or above 25'. This is the most common starting point for site searches and Cartersville-Bartow County is currently eliminated from the desktop screenings with this criteria.

RECOMMENDATIONS

MARKETING

- **Marketing Material:** CHLG recommends that CBCDED develop a brand for Cartersville-Bartow County and have a branding campaign built on differentiators to help prospects and site selectors remember Cartersville-Bartow County. The marketing material and the website appear to have a common theme and have a professional appearance; however, the branding of the community is not obvious. CHLG also recommends the development authority develop comprehensive marketing material focusing on the target industries for the area, and include property in the material suitable for the specific industry sectors. The material focused on target industries should reflect the strategic plan of the economic development efforts for the region. In addition, CHLG recommends CBCDED modify the website to include a listing of available properties and buildings easily found and easily searchable upon entering the home page of the website. It is highly recommended this list include GIS capabilities.
- **External Marketing Events:** CHLG recommends the development authority put together an event focusing on bringing site selection consultants to the community based on the numerous attractions in the area. It is understood Cartersville-Bartow County is already participating in state events focusing on bringing site selection consultants to the community. The events should highlight the area's economic development potential and build upon quality of life. In order to get in front of decision-makers, the community needs to educate the marketplace about what the Cartersville-Bartow County region has to offer.
- **Public Education and Internal Marketing:** It is recommended that Cartersville-Bartow County develop a public education and internal marketing program. Often, communities and regions focus on marketing to the outside world and what is in their backyard is overlooked. The true success of a community is experienced when the excitement extends beyond the local leadership and includes the community as a whole. CBCDED needs to develop a program to make the economic development successes and challenges known to the community. The city newsletter is a good start at addressing this issue, but something needs to be done to reach outside of the city limits. It is important for the community to understand what drives success, and the community needs to buy in on it so they carry it with them to their jobs and beyond.

"The true success of a community is experienced when the excitement extends beyond local leadership and includes the community..."

RECOMMENDATIONS

MARKETING

- **Industrial Park Zoning, Covenants and Restrictions and First Impressions:** CHLG recommends that covenants and restrictions (C&R's) be prepared for the *Cartersville-Bartow County Industrial Corporate Park*. In addition, all parks must be seen as world class. C&R's are typically used to further define regulations such as zoning, land use etc, but they can also be used to restrict various types of industries explicitly or implied based on other restrictions such as hazardous waste usage and storage, emissions, etc. Prospects looking at the parks in the area will also be looking at the diversity of parks in other markets. First impressions are lasting impressions. It is advised the park be periodically visited, and proper clean-up be taken care of as appropriate since it's location could be prone to dumping. CHLG recommends CBCDED consider enhancing the entrance of *Cartersville West Industrial Park* to give the feel of entering a world-class industrial park. The park did not have an industrial feel, rather a grouping of smaller businesses with fenced grounds.
- **Older Vacant Industrial Buildings:** CHLG recommends Cartersville-Bartow County develop a long-range plan for the older vacant industrial buildings and optimize available resources to make the land and or associated buildings market ready. The buildings are not likely to result in the generation of a prospect visit since they are older, in need of attention and most have lower ceiling heights than is typically desired by many industry sectors. Equally important, Bartow County needs to be prepared to answer questions about the buildings and communicate to prospects and site location consultants that the previous tenants of these buildings did not leave because of the quality of workforce. Site selection consultants and others closely evaluate these types of local corporate changes, as they are sometimes an indicator of the local business environment, depending on the industry and the circumstances. The opinion gathered from community interviews is somewhat reflective of the age of the facilities and the shift of market segments to China and Mexico, rather than the productivity and quality of work offered by Bartow County's employee resource pool.

LEADERSHIP

- **Community Development Strategic Planning:** CHLG recommends a strategic planning process be implemented for a community development plan. CHLG recognizes Cartersville-Bartow County is in the process of developing a strategic plan focusing on economic development. However, nothing appears to be in place to direct community development efforts. The community development plan should address issues affecting quality of life, and should help expand upon and add to the many offerings enjoyed by the citizens of the area.

RECOMMENDATIONS

LEADERSHIP

- **Workforce Development:** Many areas struggle with workforce development and with demonstrating there is an available workforce. The demographic shifts occurring presently add importance to those strategies, which are seeking to improve labor availability, quality and cost issues. We recommend the following:
 - *Work readiness:* Wherever possible, the community needs to develop programs that address high school drop out rates and school to work plans. The local educational institutions seem to be in tune with what is needed, and will be an asset to undertaking this task. Cartersville- Bartow County Department of Economic Development should seek external help in planning, programming and providing a plan for such an initiative with input and guidance from key stakeholders. An example of an arena to open these discussions includes the quarterly plant managers meeting. Models exist for such programs in Georgia and the implementation of such a program should be a priority for the community, led by both the public and private sector. Many areas face this challenge, but those that take on the problem full force can develop a compelling story to mitigate workforce as an eliminating factor. Quick Start cannot be the only means of addressing the workforce gap. Career days at local junior high and high schools are another good way to educate students and help them focus on the careers available and help teach the necessary vehicles to make the careers a reality. Career days are often done in conjunction with industry recognition weeks.

“Quick Start cannot be the only means of addressing the workforce gap.”

APPENDIX

METHODOLOGY

CH2M HILL Lockwood Greene applies a qualitative and quantitative approach backed by experienced consultants to designate target industries. The result of such an approach is a realistic grouping of target industries suitable for a community to focus their marketing efforts.

A *quantitative* model is generated specific to the region being reviewed. The model has a multitude of factors that are calculated for each of the 666 5-digit NAICS industries in the United States. The area of focus for this model was the 184 5-digit NAICS codes for the manufacturing sector (NAICS 31111 to 33999).

Below is a list of the factors and the justification for their use, which served as the basis of the target industry model, prepared specifically for Bartow County.

FACTOR	FACTOR WEIGHT
Projected Employment Growth for State of GA 2005 to 2010	5 (Heavy)
National Industry Wage Index 2005 data	5 (Heavy)
LQ Industry Concentration in the Bartow County Region in relation to the US 2005 data	3(Moderate)
Projected change in industry profitability in the Bartow County Region (2005 to 2010)	1(Minimal)
Industry Productivity Index (Output per employee State of GA relative to the US 2005 data	1(Minimal)
Projected Employment Growth US 2005 to 2010	1(Minimal)

Heavily Weighted Factors

Projected Employment Growth for the State of Georgia – This factor was weighted heavily so the target industries chosen for Bartow County will capture some of the industries projected to grow in the state of Georgia from 2005 to 2010.

National Industry Wage Index - Projected 5-digit manufacturing wages for 2005 were indexed against the average manufacturing wage for the United States. The factor gives credit to those industries paying higher than average wages and captures those industries as appropriate for Bartow County's target list.

Moderately Weighted Factors

Location Quotient for Bartow County – Location Quotients are simply a calculation to determine how concentrated an industry is in the region of study. It is important that target industry analysis take into account industries that exist in Bartow County, but not give so much credit for these industries that it dampens emerging industries that could potentially do well in the region.

Minimally Weighted Factors

Projected Change In Industry Profitability Bartow County - This factor is used to further dampen the industries resulting simply as a matter of industry concentration. It gives additional credit for existing industries predicted to be profitable in the Bartow County region.

METHODOLOGY

Projected Change in Industry Productivity for the State of Georgia – This factor brings out the industries that are not only predicted to grow, but those that are predicted to have higher than industry average productivities. It builds leverage for attracting these industries since Bartow County will be able to state, based on quantitative predictions, these industries will be more productive if located in the Bartow County region.

Projected Employment Growth US – When this factor is reviewed at a national level, it predicts industries that are going to grow nationally. Although this is insightful, many of the industries will not be suitable for the Bartow County region resulting in wasted marketing dollars, thus a lower factor was used. It is important, however, to keep a continued element of national growth in a target industry model to capture new and emerging industries.

The *qualitative* input comes from the CHLG’s team visit to the community. Talking with local leadership, existing industry, educational representatives, and others provide invaluable information that goes into reviewing the quantitative data. This insightful information obtained through the eyes and ears of seasoned site location consultants ensures the target industries chosen are realistic for Bartow County.

Target Industry Results

The Target Industry Analysis is focused on the manufacturing sector, and resulted in three major industry clusters: Communications Related Manufacturing, a Transportation Related Cluster and General Machinery, Equipment and Components. The 5-digit NAICS codes associated with each cluster are outlined within context of the report.

METHODOLOGY

- Population – Source: Claritas
- Net Migration – Source: U.S. Census Bureau
- Median Age – Source: Claritas
- Median Household Income – Source: Claritas
- Population Growth – Source: Claritas
- Population Distribution by Age – Source: Claritas
- Educational Attainment – Source: Claritas
- Cultural Opportunities– Rating based upon access to museums, symphonies, ballets, theatres and performance venues. Maximum rating = 100; higher index is considered favorable. Source, MS&B, American Association of Museums, Musical America, Opera America, American Symphony Orchestra League, Theatre Communications Group, updated in 2004.
- Recreation/Spectator Sports – Rating based upon access to college and professional sports, golf courses, water (rivers, lakes and oceans), ski areas and State and Federal recreation areas. National average index = 100; higher index is considered favorable. Source: MS&B, NCAA, NBA, NHL, NFL, “White Book of Ski Areas”, National Golf Foundation, National League of Professional Baseball Players, US Dept. of Agriculture, Dept. of Commerce, US Dept. of Interior, National Park Service, updated in 2005.
- Climate – Rating based on measures of extreme temperatures in summer and winter and number of days of rainy/ hazardous weather compared to national averages. National average index = 100; higher index is considered favorable. Source: MS&B, NOAA updated as of 2004.
- Safety – Rating based on measure of violent and property crime indexes compared to national averages (crimes per 100,000 residents). National average index = 100; lower index is considered favorable. Indexes above 100 indicate crime rates above the national average. Source: FBI, MS&B, updated as of 2004.
- Healthcare Availability – Based on per capita availability of physicians (generalists and specialists) and hospital beds. National average index = 100; higher index is considered favorable. Source: American Hospital Association, American Medical Association, US Dept. of Health and Human Services, updated as of 2003.
- Education Quality – Overall regional rating derived from levels of high school graduation rates, pupil/teacher ratios, education quotient rating (derived from educational performance compared to regional resources), and per capita library book circulation. National average index = 100. Indexes above 100 indicate education quality above national average. Source: MS&B, Claritas, Expansion Management Magazine, National Center for Educational Statistics, US Census Bureau, updated as of 2005.

METHODOLOGY

- Cost of Living Index – Composite index comprised of housing, utilities, taxes, transportation, health services, and consumable goods costs. National average index = 100; lower index is considered favorable. Source: Economic Research Institute-2006.
- Cost of Housing Index – Reflects median sales price of existing single-family homes compared to national average. National average index = 100; lower index is considered favorable. Source: National Association of Realtors and Economic Research Institute-2005.
- Traffic Congestion – Developed based on the ratio of travel time recorded in rush hour traffic to the travel time recorded during non-rush hour traffic across an area. A high congestion index indicates worse traffic congestion. Maximum index = 175 (Los Angeles). An index of 115, for example, indicates it takes an additional 15% in time for the average commuter in an area to travel the same distance during rush hour conditions. Source: Texas Transportation Institute, updated as of 2005.
- Air Quality – Source: Environmental Protection Agency as of 2006.
- Natural Disaster Rating – Lower index is considered more favorable (i.e. less chance of business disruption from natural disasters); maximum score = 100. Bartow County Region natural disaster risks include: low risk of tornados and snow/ice, and a low-moderate risk of earthquakes. Each region/metropolitan area is assigned a rating of "Little/No risk", "Low risk", "Moderate Risk" and "High Risk" for each factor based on the prevalence of weather/geological activity since records have been kept from the mid-1800's (note: scores are not based on weather records from just the past 3-4 years). Source: NOAA, U.S. Geological Survey-updated as of the 2005 hurricane season.
- Civilian Labor Force – Source: Bureau of Labor Statistics
- Labor Force Participation Rate – Source: Bureau of Labor Statistics
- Employment – Source: Bureau of Labor Statistics
- Labor Recruitability Rating – Top tier (out of five possible tier designations) is considered to be a location that is very favorable to recruit top executives and support specialists. A fifth tier designation is considered least favorable in terms of recruiting of executives and specialists. Source: MS&B corporate survey-2004-2005, Internal Revenue Service-2004.
- Unemployment Rate – Source: Bureau of Labor Statistics
- Employment Segmentation – Source: Regional Dynamics, 2005
- Overall Cost of Doing Business (CODB) Index – Incorporates labor costs, real estate costs, utilities and state/local taxes. National average index = 100; lower index is considered favorable. Source: MS&B, Economic Research Institute, State Departments of Labor, BLS, CB Richard Ellis, Grubb & Ellis, Energy Information Administration, Federation of Tax Administrators, updated 2004-2006.

METHODOLOGY

- Overall Labor Cost Index – Incorporates labor costs across all local industries. National average index = 100; lower index is considered favorable. Source: MS&B, Economic Research Institute, updated 2006
- Labor Cost Index for Key Industries – Incorporates labor costs across all related to specific industries. National average index = 100; lower index is considered favorable. Source: MS&B, Economic Research Institute, updated 2006
- Average Annual Graduates – Reflects regional availability of graduates at the associate degree level and higher. Source: Integrated Postsecondary Education Data System, updated 2004.
- Popular Degree Programs – Reflects post-secondary programs with the most graduates in the study region. Source: Integrated Postsecondary Education Data System updated 2004.