2016

# Comprehensive Economic Development Strategy (CEDS)

MID-MO Regional Planning Commission

Boone, Callaway, Cole, Cooper, Howard and Moniteau Counties

**RESOLUTION R-02-2016**

**A RRESOLUTION ADOPTING AN UPDATE OF THE**
**Comprehensive Economic Development Strategy (CEDS)**
**FOR THE MID-MISSOURI REGIONAL PLANNING COMMISSION**

WHEREAS, the Board of Directors is the executive body of the Mid-Missouri Regional Planning Commission (Mid-MO RPC), Section 251:300 of the Revised Statutes of the State of Missouri (1969); and

WHEREAS, the Comprehensive Economic Development Strategy is maintained by the Mid-MO RPC as part of a planning partnership with the Economic Development Administration and member cities and counties within the Mid-MO RPC region; and

WHEREAS, Mid-MO RPC maintains the Economic Development Strategy Plan in an effort to plan for and support economic development initiatives within the region's economic development district system; and

WHEREAS, the Economic Development Strategy contains ( 1) an overview of the Region including demographics , (2) a description of the Mid-Missouri economy including cluster analysis, (3) a SWOC analysis, (4) and a strategic organizational direction and action plan, and

WHEREAS, the Mid-MO RPC Economic Development Advisory Committee (EDAC) has recommended the adoption of the Comprehensive Economic Development Strategy (CEDS).

NOW, THEREFORE, BE IT RESORLVED that the Board of Directors hereby approves and adopts the updated 2016 Economic Development Strategy (CEDS) for the Mid-Missouri Regional Planning Commission.

Adopted this 31st day of August, 2016

Gary Jungermann, Chairman

Attest:

Ed Siegmund, Executive Director

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# i. Regional Planning Commissions

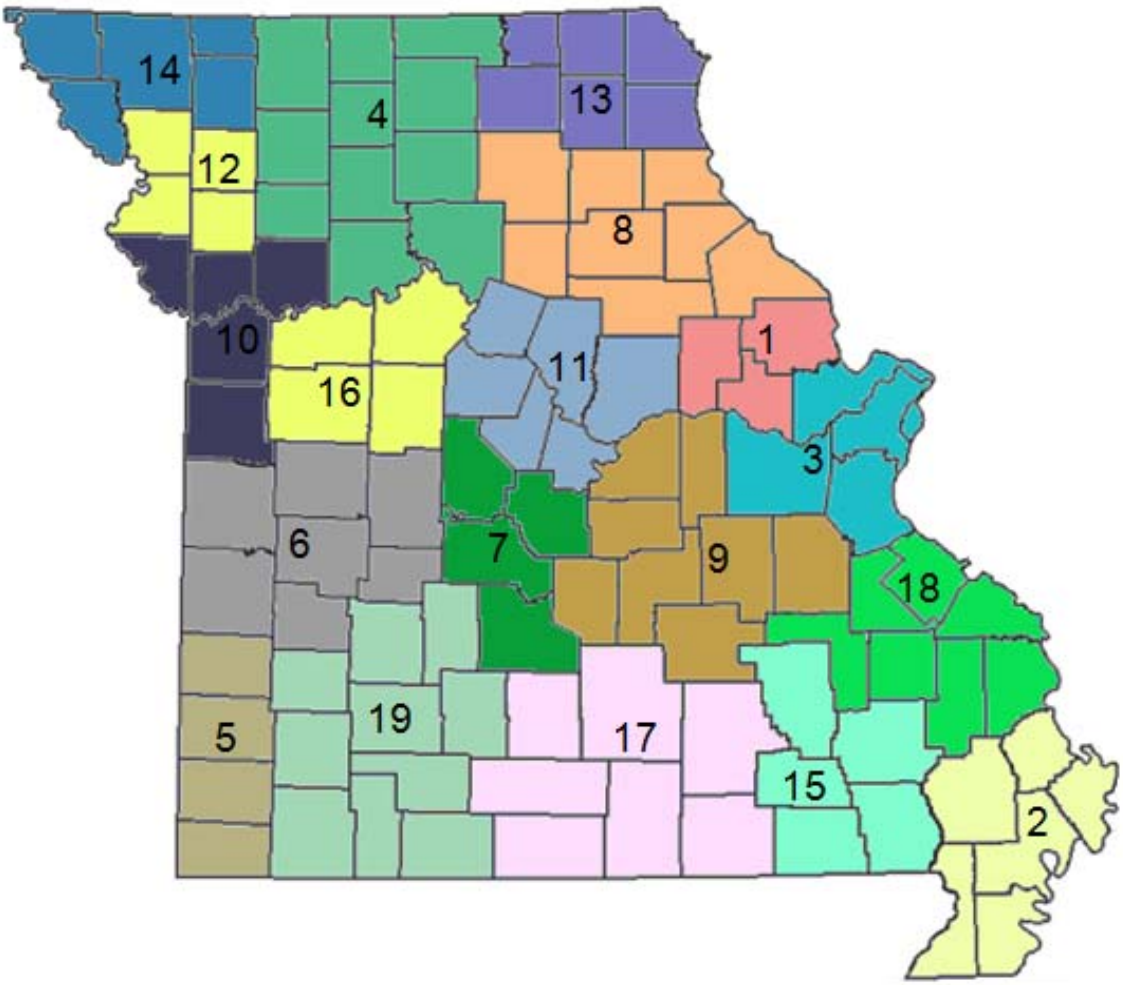
**The Regional Planning Commission Concept**

Missouri's Regional Planning Commission (RPC) and Council of Governments (COG) network has been a key partner with the state of Missouri to deliver a variety of programs and services to local jurisdictions since 1966. RPCs and COGs are structured to provide regional planning and coordination services to their member local governments and citizens. They serve as a primary mechanism in the administration of key federal and state programs.

Successful regional planning initiatives involving economic development, transportation, homeland security and hazard mitigation have exceeded federal expectations and significantly enhanced effectiveness and development in these sectors. The results of all these activities are the creation of jobs, the stimulation of private investment, and the attraction of millions of dollars to support public projects. Missouri's RPCs and COGs generate nearly $1.5 million in local dues, manage more than $300 million in public funds, and support more than $165 million in new private investment.

The map below shows each of Missouri's nineteen regional planning commissions and councils of governments and the counties they serve.

**Missouri Regional Planning Commissions and Councils of Government**




| Number | Regional Planning Commission |
|---|---|
| 1 | Boonslick Regional Planning Commission |
| 2 | Bootheel Regional Planning and Economic Development Commission |
| 3 | East-West Gateway Coordinating Council |
| 4 | Green Hills Regional Planning Commission |
| 5 | Harry S Truman Coordinating Council |
| 6 | Kaysinger Basin Regional Planning Commission |
| 7 | Lake of the Ozarks Council of Local Governments |
| 8 | Mark Twain Regional Council of Governments |
| 9 | Meramec Regional Planning Commission |
| 10 | Mid-America Regional Council |
| 11 | Mid-Missouri Regional Planning Commission |
| 12 | Mo-Kan Regional Council |
| 13 | Northeast Missouri Regional Planning Commission |
| 14 | Northwest Missouri Regional Council of Governments |
| 15 | Ozark Foothills Regional Planning Commission |
| 16 | Pioneer Trails Regional Planning Commission |
| 17 | South Central Ozark Council of Governments |
| 18 | Southeast Missouri Regional Planning and Economic Development Commission |
| 19 | Southwest Missouri Council of Governments |

# ii. CEDS Background

**The CEDS Process**

The Mid-Missouri Regional Planning Commission (Mid-MO RPC) is recognized by the U.S. Economic Development Administration (EDA) as an Economic Development District (EDD). Mid-MO RPC is responsible for working with stakeholders in the region to update the Comprehensive Economic Development Strategy every five years and takes the lead in ensuring the plan is implemented. This CEDS update process is an opportunity to review current economic conditions and take into account changes resulting from social and political shifts, major economic adjustments, and natural disasters.

This five-year update began with the gathering information that describes current conditions in the region. Numerous federal and state resources were consulted as part of this effort. This CEDS update reflects the most current information available about the region. It synthesizes data analysis with expert opinions from a diverse set of stakeholders from both the public and private sectors into an economic development strategy for the region.

Mid-MO RPC's Economic Development Advisory Committee (EDAC) served as the Comprehensive Economic Development Strategy Committee for this CEDS update process. The EDAC met to discuss the CEDS update on four separate occasions. The EDAC reviewed economic data; assisted with cluster identification; participated in a SWOC analysis session; reviewed and discussed the CEDS goals, objectives and strategies; and reviewed and discussed the CEDS action plan.

The local knowledge assembled through the EDAC allowed for discussion of important regional economic development issues. Data analysis informed the discussions, but it was the local knowledge that participants brought to the table and shared with the group that shaped the CEDS. EDAC is a standing committee that will continue to meet and oversee CEDS implementation. Stakeholders that were not able to attend EDAC meetings were consulted on an individual basis in order to include their input in the CEDS.

**Benefits of the CEDS**

Mid-MO RPC's designation as an Economic Development District (EDD) is an important component to economic development efforts in the Mid-Missouri region, and Mid-MO RPC is required to update the region's CEDS every five years in order to maintain this designation. This designation allows Mid-MO RPC to access EDA funds to carry out its mission. A planning partnership grant provides funds—matched with local dues—for staff to consult and develop projects with Mid-MO RPC membership. The CEDS and EDD designation also enables public and private organizations in the region—working in collaboration with Mid-MO RPC—to meet eligibility requirements for EDA Public Works and Economic Adjustment Assistance funding.

The CEDS document itself serves as a central path to regional data. The analysis section has value as an important source of information for grant writing and local studies. The CEDS report contains information useful to governments, land use and planning departments, program administrators, existing and prospective businesses, farmers and farm service agencies, chambers of commerce, downtown developers, emergency services, job training and employment services, real estate agents, private foundations, transportation planners, community service agencies, and many more.

Implementation of the strategies laid out in the CEDS over the next five years will allow the region to continue positioning itself as a dynamic place for businesses to start, grow and locate and for people to live, work and thrive.

# iii. CEDS Executive Summary

The Mid-Missouri economic development environment is generally strong and offers several opportunities for growth and development in the coming years. The following document provides a broad overview of the current conditions in the six-county region of the Mid-Missouri Regional Planning Commission. It highlights the strengths and weaknesses of the region as seen by a variety of regional stakeholders. It also documents the broad and specific plans for economic development activities in the region—outlining the economic development vision, goals, objectives, strategies, and priorities.

This **Comprehensive Economic Development Strategy (CEDS)** is the result of a regional planning process designed to inform, guide, and support economic development efforts in the Mid-Missouri region. The plan was created with input from a wide variety of regional leaders and stakeholders with the desired outcomes of:

- Creating better jobs and incomes
- Diversifying the economy and strengthening economic sectors
- Exposing new market potentials and business opportunities
- Increasing local capacities for development
- Developing and improving infrastructure
- Enhancing the quality of life

The CEDS builds on analysis of current conditions and trends, but it is also very much a vision of the future—what the citizens of the region want to accomplish. It also articulates a commitment to a general framework for pursuing the chosen goals. Considerable effort was made in the process to choose the strategies most likely to produce these outcomes and at the same time offer the best returns on the investment of time, money, and staff resources.

**The Regional Economic Base**

Higher education and state government serve as the cornerstones of the Mid-Missouri economy. Higher education is the single biggest driver of economic growth and innovation in Mid-Missouri. The University of Missouri—located in Columbia—includes economic development as one of the four pillars of its mission. The university is a driving force behind the region's strength in the bioscience sector and a key partner in establishing a new regional cluster centered on the university's nuclear research reactor.

The economic impact of higher education in Mid-Missouri, however, goes well beyond the University of Missouri. In total, there are seven four-year higher education institutions and three two-year public higher education institutions in the six-county region. These higher education institutions serve a valuable role as job training resources for both existing businesses and businesses looking to relocate into the region.

The State of Missouri is the single largest employer in the region and dominates the Jefferson City economy in particular. The state also draws thousands of employees from neighboring counties both inside and outside of the Mid-MO RPC region. Private sector employment in the region is also influenced by the State of Missouri. Several private companies in area have business models that are heavily reliant on state contracts.

While higher education and state government are the two largest employers in the region, Mid-Missouri has a diversified economy with several other key industries and sectors having a major impact on the regional economy. Healthcare, manufacturing, book wholesalers, finance and insurance, food processing and tourism are all industries that are vital to the regional and local economies.

**Regional Strengths, Weaknesses, Opportunities and Challenges (SWOC)**

The Mid-Missouri region is experiencing rapid growth in and around Columbia, steady growth over most of the rest of the region, and negative growth in Howard County and some of the smaller communities farthest away from Columbia and Jefferson City. The region has a highly educated workforce with low unemployment but high underemployment. Incomes and cost of living both tend to be lower than the national average. Quality of life factors tend to be strong in the region with diverse possibilities for entertainment and leisure activities, low commute times, and low crime rates.

The full list of regional strengths, weaknesses, opportunities and challenges are outlined in the table below.

| Strengths / Opportunities | Weaknesses / Challenges |
|---|---|
| • Highly educated workforce<br>• Broadband – National leader in gigabit<br>• Highway and rail access<br>• Central location<br>• University of Missouri's economic development mission<br>• Job training resources<br>• Life science / bioscience sector and infrastructure<br>• Nuclear infrastructure including University of Missouri Research Reactor (MURR) and Callaway Energy Center<br>• Discovery Ridge Research Park<br>• Entrepreneurship development efforts growing in larger communities<br>• Competitive Electric Rates<br>• Tourism<br>• Quality of Life/Recreational Opportunities<br>• Low cost of living<br>• Healthcare<br>• Crime rates<br>• High economic resilience<br>• Redevelopment opportunities are abundant | • Losing talent to STL, KC and out-of-state<br>• Low unemployment rate<br>• Underemployment<br>• Lack of wet lab space<br>• No space/location for businesses graduating from MU Life Science Incubator<br>• Regional airport infrastructure<br>• Lack of port availability and access<br>• Lack of access to capital<br>• Transportation infrastructure condition and funding<br>• Transit services availability and access<br>• Connecting education and job training to existing jobs<br>• Aging utility infrastructure<br>• Wastewater infrastructure in small/rural communities<br>• Rural broadband outside of areas served by Co-Mo Electric and Socket Telecom<br>• Not duplicating successes across the region<br>• Entrepreneurship resources, especially in rural communities<br>• Lack of funding for small rural economic development organizations<br>• State government employee pay and employment levels |

**Mid-MO Strengths within the State of Missouri Target Clusters**

Through an extensive planning effort, the State of Missouri has identified seven target clusters as the focus of its economic development strategy. Part of this planning effort included a 4-digit NAICS code cluster analysis. The planning effort resulted in the following seven target clusters for the State of Missouri: Advanced Manufacturing, Energy Solutions, Biosciences, Health Science and Services, Information Technology, Financial and Professional Services, Transportation and Logistics.

In an effort to keep Mid-Missouri economic development efforts consistent with the State of Missouri's statewide economic development strategy, RPC staff conducted the same 4-digit NAICS code cluster analysis that the state used for its statewide plan for each of the six Mid-MO RPC counties. The benefit of

this approach is that it ties the Mid-MO RPC CEDS directly to the state economic development strategy that is already in place and being implemented.

The following table depicts the Mid-Missouri industries that were the strongest within the state target clusters as identified through the 4-digit NAICS code analysis.

| Target Cluster | Industry | County / Region | Location Quotient (LQ)* | Job Growth Rate (2009 to 2013) | Local > National Growth Rate |
|---|---|---|---|---|---|
| Advanced Manufacturing | Plastics Product Manufacturing | Cole | 0.94 | Data Not Available | Data Not Available |
| Bioscience | Oilseed and Grain Farming | Callaway and Cooper | 9.23, 12.02 | 132%, 26% | Yes, No |
| Bioscience | Hog and Pig Farming | Callaway | 18.81 | 25% | Yes |
| Bioscience | Medical and Diagnostic Labs | Boone | 2.80 | 2% | No |
| Financial Solutions | Insurance Agencies, Brokerages, and Related Services | Boone | 2.44 | 331% | Yes |
| Financial Solutions | Depository Credit Intermediation | Cole and Howard | 1.35, 3.02 | 11%, 2% | Yes |
| Health Science and Services | Nursing Care Facilities | Mid-MO Region | 1.14 | 9% | Yes |
| Health Science and Services | Residential Mental Health Facilities | Boone | 1.21 | 3% | No |
| Health Science and Services | Community Care Facilities for the Elderly | Boone and Howard | 1.23, 6.60 | 45%, -2% | Yes, No |
| Information Technology | Data Processing and Related Services | Cole | 2.73 | 152% | Yes |
| Information Technology | Computer Systems Design and Related Services | Boone and Cole | 1.11, 1.16 | 150%, 66% | Yes, Yes |

* An **LQ greater than 1** means that there is a high concentration of industry employees in a given region when compared to the nation as a whole. An **LQ greater than 1.25** is a very high concentration.

Key findings of Mid-Missouri 4-digit NAICS code cluster analysis include:

- Strength within the bioscience cluster was identified as expected. The University of Missouri is a national leader in bioscience education and research. This cluster has been a key economic development target in recent years and will continue to be a target in the future.
- Growth within the Insurance Agencies, Brokerages, and Related Services industry is phenomenal, with over 300% growth rate between 2009 and 2013.
- Plastics Product Manufacturing in Cole County is shown as having an LQ just under 1 (0.94), however, since these 2013 numbers were released a new plasters product manufacturer has moved to Jefferson City. The new company estimates that it will employ 150 new employees, which should push the LQ to well over 1 and help contribute to a high growth rate once these new employees are added to the official data.
- Boone County and Cole County both have strong information technology industries. Columbia is home to nationally recognized IT companies like IBM and Carfax. The Jefferson City IT industry's strength is attributable to businesses that focus on providing support to the State of Missouri.

**Regional Goals, Objectives and Strategies**

Regional goals, objectives and strategies were formulated during the CEDS planning process with input from the Economic Development Advisory Committee, Mid-MO RPC membership, and numerous stakeholders from around the region. The goals, objectives and strategies of multiple planning and development organizations operating in the region have also been reviewed in order to discern areas of overlapping interest and to clarify the roles of the various organizations in regard to specific development activities. As a result, Mid-MO RPC planners have been able to identify areas where Mid-MO RPC may take a leadership role and which areas are more appropriate for Mid-MO RPC to take more of a supporting role.

The goals, objectives and strategies were designed to capitalize on regional assets and current opportunities and to respond to current and projected conditions in the region.

**Goal:** Job creation and retention, with an emphasis on quality jobs

**Objective:** Increase the number of quality jobs in the region by attracting new employers to the region and encouraging expansion of existing business, and retaining employers that have been the cornerstones of the Mid-Missouri economy.

- ***Strategy # 1*** – Provide linkages between communities or organizations and sources of funding and expertise for economic development activities.
- ***Strategy # 2*** – Provide direct technical assistance to communities and organizations for economic development activities.
- ***Strategy # 3*** -- Assist planning partners and other regional organizations with their identified economic development activities as follows:
    - Promote target clusters including regional strengths of bioscience/life science, advanced manufacturing, health science and services, information technology, and a potential cluster developing around Mid-Missouri's nuclear infrastructure (all partners)
    - Promote the region as a unique repository of a skilled and experienced labor pool (All partners)
    - Promote University of Missouri as a vital economic enterprise (UMC)
    - Technology transfer and entrepreneurial incubation (UMC)
    - Support efforts to develop a business accelerator facility that could serve as a location for businesses graduating from the MU Life Science Incubator (REDI, UMC)
    - Promote workforce development initiatives, especially those that focus on technical skills and/or closely incorporate employer-based curriculum (higher education institutions, local school districts, local economic development organizations, Chambers of Commerce, DED)
    - Promote tourism (DED) (CVBs)
    - Regional branding and marketing (CORE)
    - Improve economic opportunities for rural areas (USDA) (DED)

**Goal:** Development and maintenance of infrastructure

**Objective:** Maintain existing infrastructure and develop new infrastructure that will lead to economic development opportunities and improve the quality of life in the region.

- ***Strategy # 1*** -- Maintain the Mid-Missouri Regional Transportation Plan which identifies and prioritizes transportation projects on the MoDOT system for the region.
- ***Strategy # 2 --*** Promote local long range planning.
- ***Strategy # 3*** -- Assist partners with their infrastructure projects and initiatives.
    - Create competitive industrial sites (Chambers of Commerce)
    - Infrastructure required to promote University of Missouri as a vital economic enterprise, including MU Life Science Business Incubator at Monsanto Place, Discovery Ridge Research Park and a business accelerator facility

    - Promote improvements to the Columbia Regional Airport (REDI)
    - Infrastructure required for workforce development purposes (higher education institutions, DED)
    - Promote redevelopment of existing infrastructure including the former Kemper Military Academy, old St. Mary's Hospital facility and former Missouri State Penitentiary site (City of Boonville and JC Chamber)
    - Maintain an adequate supply and quality of housing stock and public facilities (DED)
    - Staff and participate in regional Transportation Advisory Committee (DOT)
    - Staff and support Regional Homeland Security Advisory Committee (DHS)
- ***Strategy # 4*** -- Provide member communities linkages to information about the latest infrastructure funding and initiatives.
- ***Strategy # 5* --** Promote the use of modern infrastructure management systems.
- ***Strategy # 6***-- Encourage the development of new parks, trails and other recreational opportunities both as a means to improve quality of life for residents and as potential attractions to encourage tourists and others living outside the region to visit.

**Goal:** Be competitive and prepared for opportunities

**Objective:** Ensure that Mid-Missouri communities and regional stakeholders do the background, preparatory, and marketing work that makes them eligible and able to take advantage of and be competitive for economic development opportunities.

- ***Strategy # 1*** – Provide direct technical assistance for members and regional entities and provide linkages to appropriate public and private sources of support for community and economic development activities .
- ***Strategy # 2*** –Assist communities with local comprehensive plans, economic development strategies, and other local planning efforts.
- **Strategy # 3** –Support and assist planning partners and other regional organizations with their community and economic development goals.
- ***Strategy # 4*** –Prepare, with the collaboration of the EDAC, a Comprehensive Economic Development Strategy every five years, and review the related work plans annually.

**Goal:** Entrepreneurship and small business development

**Objective:** Capitalize on current resources and develop additional resources for entrepreneurship and small business development

- ***Strategy #1*** - Encourage the creation of capital investment resources including RLF development in the region.
- ***Strategy # 2* -** Assist partners in leveraging financing and technical resources for entrepreneurial and economic development activities .
    - Increase revenue from tourism (DED) (CVBs)
    - Assist the development of creative business plans (MU Extension)
    - Incubate and accelerate innovative biotech businesses (UMC)
    - Redevelop existing industrial sites (All partners)
    - Promote and support tourism organizations (all partners)
    - Promote and support small farm development (USDA)
    - Promote and support green technology (DED) (DNR)
- ***Strategy # 3* -** Promote collaborative marketing for business clusters.

**Goal:** An economically resilient region

**Objective:** Increase economic resiliency in the region.

- ***Strategy #1*** - Continue to promote and/or facilitate Continuity of Operations Planning (COOP) awareness to Mid-MO RPC members and area chambers of commerce.
- ***Strategy #2*** - Continue educational efforts on the need to consider resiliency principles in all planning activities.
- ***Strategy # 3*** - Support efforts to diversify the regional economy by attracting and developing new industries.
- ***Strategy #4*** - Support efforts to strengthen and diversify existing supply chains.

**Goal:** Informed communities, citizens and stakeholders

**Objective:** Ensure that the membership of the Mid-Missouri Regional Planning Commission, the citizens of the region, and stakeholders have current information about economic opportunities and activities that impact the economic health of the region.

- ***Strategy # 1*** – Obtain and disseminate information about current opportunities and developmental resources.
- ***Strategy # 2*** – Plan and facilitate regular meetings of the membership and various committees to review and respond to information about economic activities and opportunities.
- ***Strategy # 3*** – Keep abreast of "best practices" in regard to economic development by participation in professional organizations and systematically reviewing pertinent literature.
- ***Strategy # 4*** – Support and assist planning partners and other regional organizations with their identified educational and communication activities as follows:
    - Form and maintain strategic and mutually supportive alliances in the region (CORE)
    - Keep stakeholders informed and responsive to current site selection criteria (University Extension, Chambers of Commerce)
    - Maintain communications with major employers and stakeholders to identify and alleviate risks to stability (Chambers of Commerce)

**Goal:** An efficient and effective organization

**Objective:** Maintain and further develop Mid-MO RPC as an efficient and effective organization for the delivery of community and economic development services and increase staff capacity in order to better serve our membership, better collaborate with stakeholders and planning partners, and engage in dynamic community and economic development initiatives.

- ***Strategy # 1*** –Sustain and manage the funding necessary for the organization to employ appropriately skilled staff.
- ***Strategy # 2*** – Provide staff with education and development opportunities such that they keep abreast of current technology and best practices.
- ***Strategy # 3*** – Engage in continual outreach to members and community stakeholders to provide them the information they need to make best use of the RPC resources.
- ***Strategy # 4 –*** Collaborate with partners to share resources and avoid duplication of service.

# I. The Mid-Missouri Region

## A. Regional Overview

### The Region

The Mid-Missouri (Mid-MO) Region is comprised of six counties in central Missouri, approximately half way between the major metropolitan areas of St. Louis and Kansas City.

Columbia and Jefferson City are the major urban centers of the region. They are the major regional hubs of employment and commerce.

Columbia is home to the University of Missouri's flagship campus. The University of Missouri is a world-class research institution, and as such is a major source of innovation. It is the region's greatest economic development asset.

Jefferson City is the State Capital of Missouri. The State of Missouri is the region's largest employer, and as a result is a major factor in the regional economy and labor market.

The region is still slightly more rural than urban, and contains a number of small communities that retain their quaint, historic, and attractive nature.

The Mid-Missouri Region is comprised of the following six counties and forty municipalities (listed based on population):

**Boone County:** Columbia, Centralia, Ashland, Hallsville, Sturgeon, Harrisburg, Rocheport, Hartsburg, Pierpont, Huntsdale, and McBaine;

**Cole County**: Jefferson City, Wardsville, St. Martins, Taos, Russellville, Centertown, St. Thomas, and Lohman;

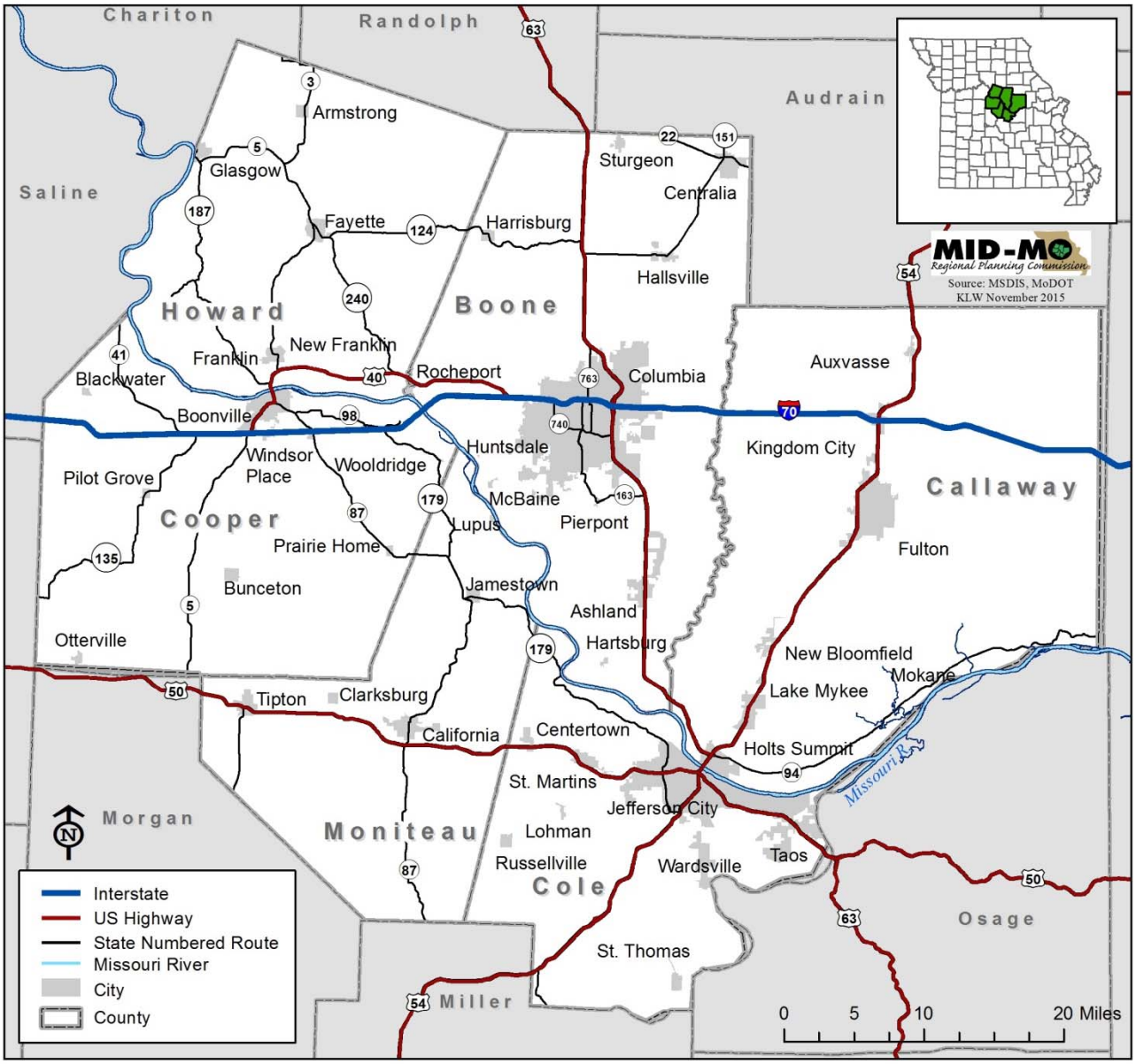
**Callaway County:** Fulton, Holts Summit, Auxvasse, New Bloomfield, Lake Mykee, Mokane, and Kingdom City;

**Cooper County:** Boonville, Pilot Grove, Otterville, Bunceton, Windsor Place, Prairie Home, Blackwater, and Wooldridge;

**Moniteau County:** California, Tipton, Jamestown, Clarksburg, and Lupus;

**Howard County:** Fayette, New Franklin, Glasgow, Armstrong, and Franklin.

**Figure 1.0 Mid-Missouri Region**




## Geography and Landscape

Mid-Missouri is approximately 3,363 square miles, which makes it roughly double the size of Rhode Island.

The Missouri River flows through the center of the region and borders all six counties. Boone, Callaway and Howard Counties are north of the river; Cole, Cooper and Moniteau Counties are south of the river. The river bottoms contain some of the most fertile and productive agricultural soils in the country, and the natural beauty of the river valley offers numerous recreational and tourism opportunities. There are five sizeable rivers, and a myriad of smaller tributaries traversing the region and feeding into the Missouri River.

Moving away from the river in either direction the landscape consists of rolling hills and considerable wooded acreage. In the Northwest, the hills begin to give way to more prairie land, containing larger agricultural operations. Away from the urban centers, there remains a lot of open space, used in a variety of agricultural and outdoor pursuits.

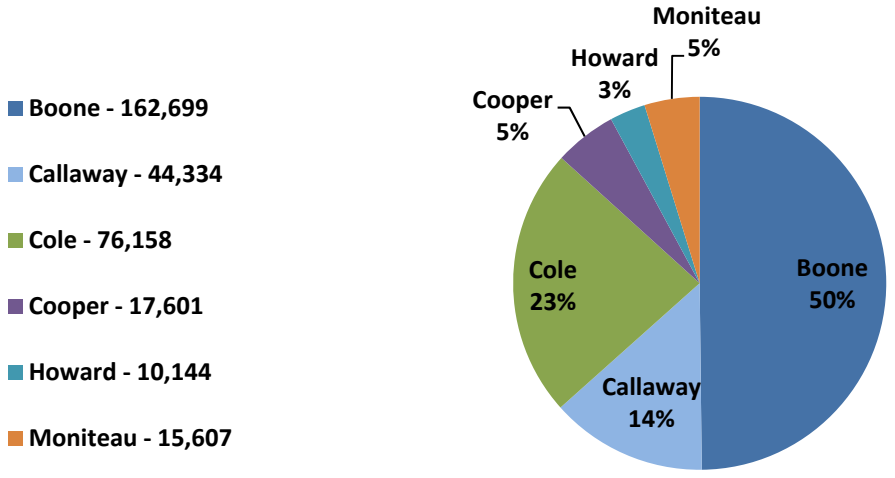
# Demographics

## Population

The 2010 U.S. Census shows that the total population of the Mid-MO RPC Region is 326,543. Columbia (Boone County) and Jefferson City (Cole County) are the two most heavily populated cities in the Mid-MO RPC region with populations of 108,500 and 43,079. The Mid-MO RPC Region has several other cities with populations ranging from roughly 2,500 to 13,000. These communities are (in descending order) Fulton, Boonville, Centralia, California, Ashland, Tipton and Fayette.

Figure 1.1 shows the breakdown of the Mid-Missouri RPC Region by county. Almost three-fourths of residents live in either Boone County or Cole County.

**Figure 1.1 County Population as Percentage of Mid-MO RPC Region**




*Source: USDC, Bureau of the Census, Decennial Census 2010*

## Population Change

Growth centers are a focal point for development and tend to generate employment opportunities. Businesses are attracted to a designated growth center because of the potential for growth, foot traffic and shared resources. Rapid growth can also be a strain on local infrastructure.

As figure 1.2 shows, Boone County is the highest growth area in the Mid-MO RPC Region. Columbia and Ashland, in particular, have experience rapid growth in rent years. Other high growth areas in the region include the communities along Highway 54 between Jefferson City and Fulton, and the area just south of Jefferson City in and around Wardsville. While the region as a whole is experience population growth, several of the smaller rural communities at the edge of the region and/or away from the major highways losing population. Howard County is the place within the region where population loss is the most evident and widespread.

**Figure 1.2 Mid-MO RPC 2000-2010 Change in Population**

| County/City | 2000 | 2010 | % Change | County/City | 2000 | 2010 | % Change |
|---|---|---|---|---|---|---|---|
| **Boone** | **135,454** | **162,699** | **20%** | **Cooper** | **16,670** | **17,601** | **6%** |
| Ashland | 1,869 | 3,707 | **98%** | Blackwater | 199 | 162 | **-19%** |
| Centralia | 3,774 | 4,027 | **7%** | Boonville | 8,202 | 8,319 | **1%** |
| Columbia | 84,531 | 108,500 | **28%** | Bunceton | 348 | 354 | **2%** |
| Hallsville | 978 | 1,491 | **52%** | Otterville | 476 | 454 | **-5%** |
| Harrisburg | 184 | 266 | **45%** | Pilot Grove | 723 | 768 | **6%** |
| Hartsburg | 108 | 103 | **-5%** | Prairie Home | 220 | 280 | **27%** |
| Huntsdale | | 31 | | Windsor Place | | 309 | |
| McBaine | 17 | 10 | **-41%** | Wooldridge | 47 | 61 | **30%** |
| Pierpont | | 76 | | **Howard** | **10,212** | **10,144** | **-1%** |
| Rocheport | 208 | 239 | **15%** | Armstrong | 287 | 284 | **-1%** |
| Sturgeon | 944 | 872 | **-8%** | Fayette | 2,793 | 2,688 | **-4%** |
| **Callaway** | **40,766** | **44,334** | **9%** | Franklin | 112 | 95 | **-15%** |
| Auxvasse | 901 | 983 | **9%** | Glasgow | 1,263 | 1,067 | **-16%** |
| Fulton | 12,128 | 12,790 | **5%** | New Franklin | 1,145 | 1,089 | **-5%** |
| Holts Summit | 2,935 | 3,247 | **11%** | **Moniteau** | **14,827** | **15,607** | **5%** |
| Jefferson City* | | 22 | | California | 4,005 | 4,278 | **7%** |
| Kingdom City | 121 | 128 | **6%** | Clarksburg | 375 | 334 | **-11%** |
| Lake Mykee | 326 | 350 | **7%** | Jamestown | 382 | 386 | **1%** |
| Mokane | 188 | 185 | **-2%** | Lupus | 29 | 33 | **14%** |
| New Bloomfield | 599 | 669 | **12%** | Tipton | 3,261 | 3,262 | **0%** |
| **Cole** | **71,397** | **76,158** | **7%** | | | | |
| Centertown | 257 | 278 | **8%** | | | | |
| Jefferson City | 39,636 | 43,057 | **9%** | | | | |
| Lohman | 168 | 163 | **-3%** | | | | |
| Russellville | 758 | 807 | **6%** | | | | |
| St. Martins | 1,023 | 1,140 | **11%** | | | | |
| St. Thomas | 287 | 263 | **-8%** | | | | |
| Taos | 870 | 878 | **1%** | | | | |
| Wardsville | 976 | 1,506 | **54%** | | | | |

*Source: USDC, Bureau of the Census, Decennial Census 2000, 2010*

| |
|---|
| > 50% increase |
| 20%-50% increase |
| < 20% increase |
| 0% or negative change |

* Portion of Jefferson City in Callaway County

Figures 1.3 and 1.4 show the historic populations trends in the Mid-MO RPC Region over the past 50 years. During this time period, Boone County has growth at more than twice the rate of the national average. Boone County has also experienced 20% growth over each of the past two decades. Growth rates in Cole and Callaway County has also exceeded the national growth rate over the past 50 years, however, both counties had growth rates less than the national average from 2000 to 2010.

**Figure 1.3 Population Change 1960-2010**

| | 1960 | 1970 | 1980 | 1990 | 2000 | 2010 |
|---|---|---|---|---|---|---|
| Boone | 55,202 | 80,911 | 100,376 | 112,379 | 135,454 | 162,642 |
| Callaway | 23,858 | 25,850 | 32,252 | 32,809 | 40,766 | 44,332 |
| Cole | 40,761 | 46,228 | 56,663 | 63,579 | 71,397 | 75,990 |
| Cooper | 15,448 | 14,732 | 14,643 | 14,835 | 16,670 | 17,601 |
| Howard | 10,859 | 10,561 | 10,008 | 9,631 | 10,212 | 10,144 |
| Moniteau | 10,500 | 10,742 | 12,068 | 12,298 | 14,827 | 15,607 |
| Mid-MO RPC Region | 156,628 | 189,024 | 226,010 | 245,531 | 289,326 | 326,316 |

*Source: USDC, Bureau of the Census, Decennial Census 1960-2010*

**Figure 1.4 Population Percent Change 1960-2010**

| | 1960-1970 | 1970-1980 | 1980-1990 | 1990-2000 | 2000-2010 | 1960-2010 |
|---|---|---|---|---|---|---|
| Boone | 46.6% | 24.1% | 12.0% | 20.5% | 20.1% | 194.6% |
| Callaway | 8.3% | 24.8% | 1.7% | 24.3% | 8.7% | 85.8% |
| Cole | 13.4% | 22.6% | 12.2% | 12.3% | 6.4% | 86.4% |
| Cooper | -4.6% | -0.6% | 1.3% | 12.4% | 5.6% | 13.9% |
| Howard | -2.7% | -5.2% | -3.8% | 6.0% | -0.7% | -6.6% |
| Moniteau | 2.3% | 12.3% | 1.9% | 20.6% | 5.3% | 48.6% |
| Mid-MO RPC Region | 20.7% | 19.6% | 8.6% | 17.8% | 12.8% | 108.3% |
| Missouri | 8.3% | 5.1% | 4.1% | 9.3% | 7.0% | 38.6% |
| United States | 13.4% | 11.4% | 9.8% | 13.2% | 9.7% | 72.2% |

*Source: USDC, Bureau of the Census, Decennial Census 1960-2010*

## Population Projections

Population projections suggest that population growth in the Mid-Missouri region will continue through 2030. These projections also indicate that growth will be continue to be most prominent in Boone County and that Callaway County will also continue to experiencing a fast growth rate.

**Figure 1.5 Mid-MO RPC Region Projected Population 2030**

| | 2010 | 2030 |
|---|---|---|
| Boone | 162,699 | 204,264 |
| Callaway | 44,334 | 55,096 |
| Cole | 76,158 | 83,583 |
| Cooper | 17,601 | 20,979 |
| Howard | 10,144 | 10,307 |
| Moniteau | 15,607 | 16,638 |
| Mid-Mid RPC Region | 326,543 | 390,867 |

*Source: Missouri Office of Administration*

## Age

An analysis of median age in the Mid-MO RPC Region shows that there is a wide disparity in median age across Mid-Missouri counties. Boone County is one of the five youngest counties in the state of Missouri due to the presence of the University of Missouri. Callaway, Cole and Moniteau counties all fall between the Missouri median age and the national median age. Howard and Cooper counties have median ages slightly higher than the Missouri median age, but (as shown in Figure 1.7) these counties are not dealing with the same aging dynamics present in other parts of Missouri.

**Figure 1.6 Median Age Comparison**

| | |
|---|---|
| Boone County | 29.7 |
| Callaway County | 37.9 |
| Cole County | 37.8 |
| Cooper County | 38.5 |
| Howard County | 39.4 |
| Moniteau County | 37.8 |
| Missouri | 38.0 |
| United States | 37.2 |

*Source: 2009-2013 American Community Survey 5-year Estimates*

**Figure 1.7 Missouri Median Age, by County**

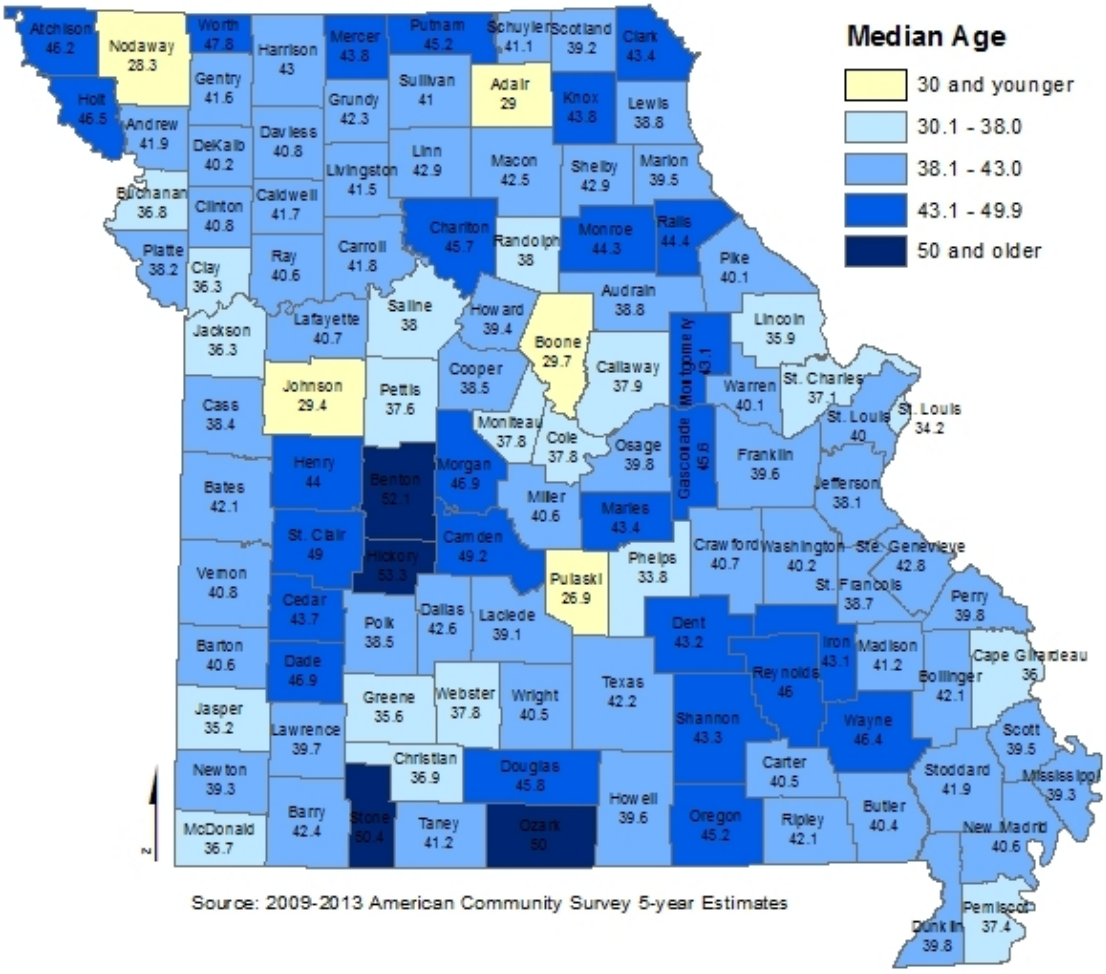
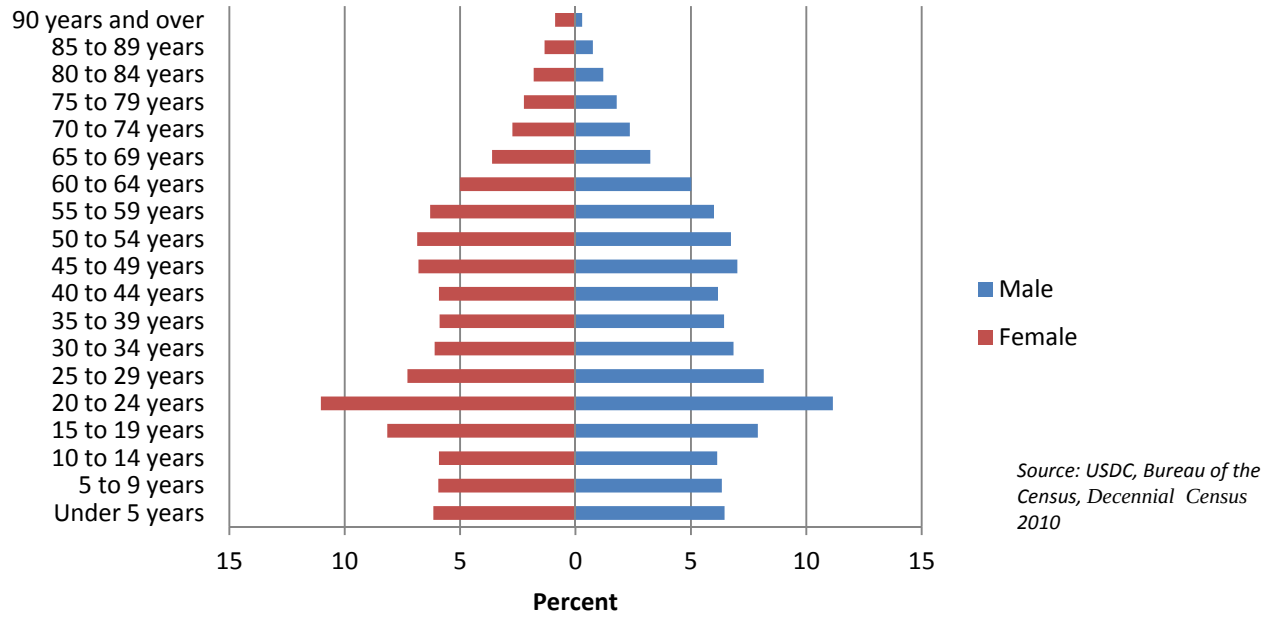


Figure 1.8 further demonstrates that the number of higher education institutions in the region, especially the University of Missouri, are contributing to a large number of 20-24 year olds in the region. Figure 1.8 also shows that baby boomers are a prevalent age group in the region as they are in the rest of the country.

**Figure 1.8 Mid-MO RPC Region Age Distribution**




*Source: USDC, Bureau of the Census, Decennial Census 2010*

## Diversity

The Mid-Missouri Region has a race composition that is predominately white but is increasingly becoming a more diverse area. Minorities currently make up 17.7% of the population which is up from 12.5% in 2009. Figure 1.9 shows how the racial and Hispanic origin makeup of Mid-MO Region compares to Missouri and the United States as a whole. Figure 1.10 breaks down the racial and Hispanic origin makeup of each individual county within the Mid-MO Region.

It is noteworthy that there is a large multicultural community and a wealth of multicultural activity in the Columbia area and in and around all of the institutions of higher education in the region. In the Jefferson City area there is a deeply rooted African American population and society associated with Lincoln University, a historic black college founded by African American Veterans of the Civil War.

**Figure 1.9 Race and Hispanic Origin Comparison**

| | Mid-MO Region | | Missouri | | United States | |
|---|---|---|---|---|---|---|
| White | 282,946 | 85.1% | 4,991,914 | 82.8% | 231,849,713 | 73.8% |
| Black or African American | 27,229 | 8.2% | 695,813 | 11.5% | 39,564,785 | 12.6% |
| Native American and Alaskan Native | 1,240 | 0.4% | 24,269 | 0.4% | 2,565,520 | 0.8% |
| Asian | 8,026 | 2.4% | 101,772 | 1.7% | 15,710,659 | 5.0% |
| Native Hawaiian and Pacific Islander | 227 | 0.1% | 5,983 | 0.1% | 535,761 | 0.2% |
| Other Race | 3,273 | 1.0% | 64,057 | 1.1% | 14,754,895 | 4.7% |
| Two or more races | 9,723 | 2.9% | 144,268 | 2.4% | 9,125,751 | 2.9% |
| Hispanic or Latino | 9,096 | 2.7% | 226,388 | 3.8% | 53,070,096 | 16.9% |

*Source: USDC, Bureau of the Census, American Community Survey, 5-year Estimates 2010-2014*

**Table 1.10 Race & Hispanic Origin of CORE Region by County**

| | Boone | | Callaway | | Cole | | Cooper | | Howard | | Moniteau | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| White | 138,849 | 82.5% | 40,837 | 91.8% | 63,563 | 83.2% | 15,770 | 89.7% | 9,340 | 91.7% | 14,587 | 92.8% |
| Black or African Amer. | 14,684 | 8.7% | 1,719 | 3.9% | 8,732 | 11.4% | 1,006 | 5.7% | 514 | 5.0% | 574 | 3.7% |
| Native Amer. & Alaskan Native | 467 | 0.3% | 244 | 0.5% | 333 | 0.4% | 38 | 0.2% | 76 | 0.7% | 82 | 0.5% |
| Asian | 6,739 | 4.0% | 347 | 0.8% | 849 | 1.1% | 53 | 0.3% | 18 | 0.2% | 20 | 0.1% |
| Native Hawaiian & Pacific Islander | 128 | 0.1% | 0 | 0.0% | 79 | 0.1% | 0 | 0.0% | 15 | 0.1% | 5 | 0.0% |
| Other Race | 1,109 | 0.7% | 269 | 0.6% | 1,524 | 2.0% | 118 | 0.7% | 42 | 0.4% | 211 | 1.3% |
| Two or more races | 6,292 | 3.7% | 1,067 | 2.4% | 1,346 | 1.8% | 600 | 3.4% | 178 | 1.7% | 240 | 1.5% |
| Hispanic or Latino | 5,259 | 3.1% | 796 | 1.8% | 1,985 | 2.6% | 255 | 1.5% | 137 | 1.3% | 664 | 4.2% |

*Source: USDC, Bureau of the Census, American Community Survey, 2014 5-year Estimates*

## Land Use

Land Use planning is an important tool in understanding existing uses, changes, and developing a plan for the growth. Understanding where certain uses exist and where they are changing supports plans for construction of transportation infrastructure and other services as well as taking steps to secure financing.

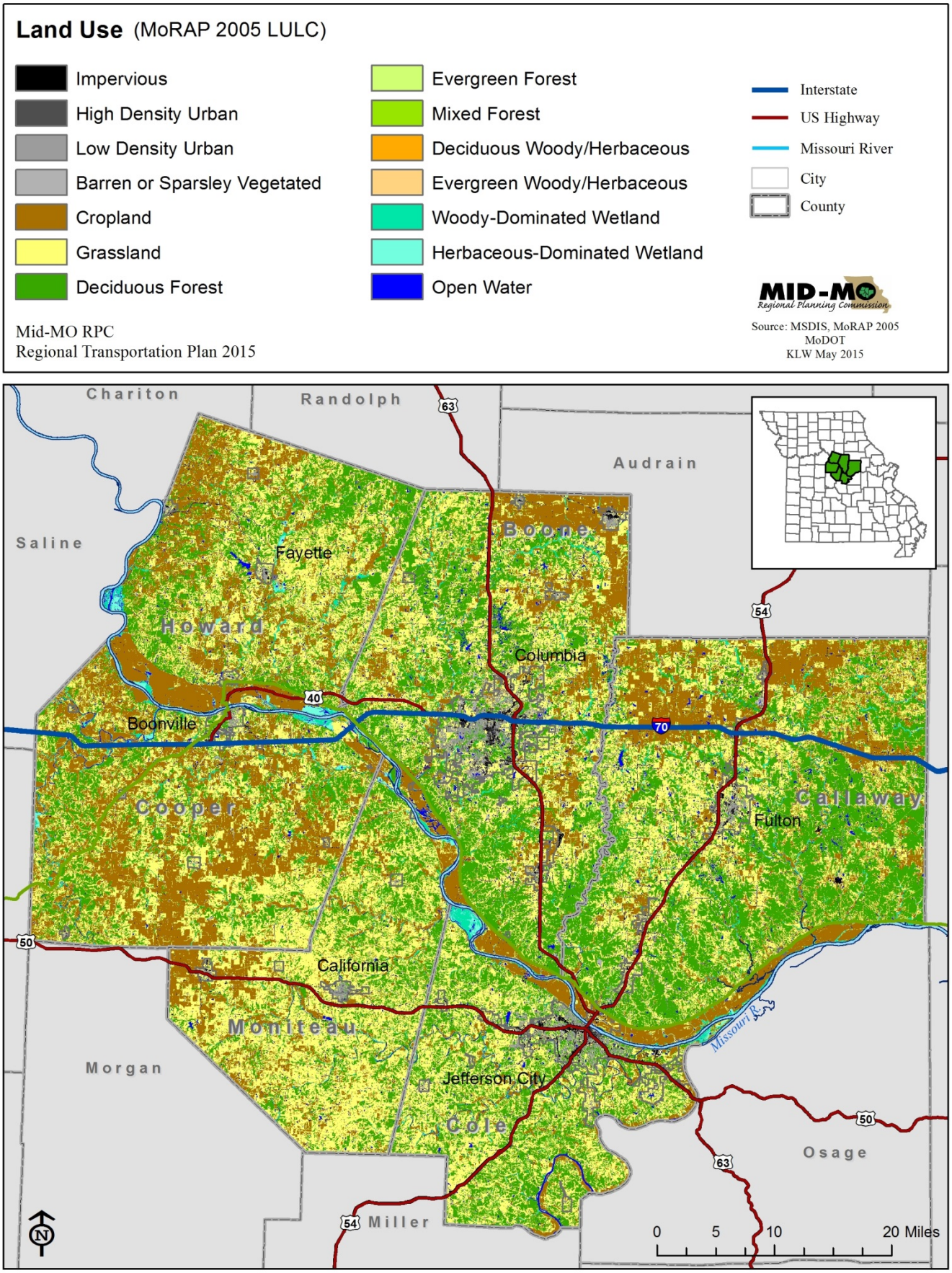
The Mid-MO RPC region includes 3,363 square miles or 5 percent of the state. The state of Missouri's land area is approximately 68,886 square miles. According to the 2010 US Census, population density in the region is approximately 96 persons per square mile. The region experienced a population increase of 7.6% between 2000 and 2010 which is higher than the state increase of 7% but lower than the national rate of 9%.

Population has a direct impact on land use and development. This section will profile three major land use categories in Mid-Missouri:

- Urban Land Use
- Agricultural Land Use
- Public Land Use

Figure 1.11 depicts current land use/land cover in the Mid-Missouri region. This information is refined from state wide 2005 remotely sensed data and is not intended for detailed analysis, but gives a general representation of current land use/land cover.

**Figure 1.11 Current Land Use of Mid-Mid MO RPC Region**



## Urban

The Census Bureau's urban areas represent densely developed territory, and encompass residential, commercial, and other non-residential urban land uses. Both the Missouri Census Data Center and US Census Bureau provided the information in this section.

According to the US Census Bureau, in the 2010 Census, an urban area comprises a densely settled core of census tracts and/or census blocks that meet minimum population density requirements, along with adjacent territory containing non-residential urban land uses as well as territory with low population density included to link outlying densely settled territory with the densely settled core. To qualify as an urban area, the territory identified according to criteria must encompass at least 2,500 people, at least 1,500 of which reside outside institutional group quarters. The Census Bureau identifies two types of urban areas:

- Urbanized Areas (UAs) of 50,000 or more people;
- Urban Clusters (UCs) of at least 2,500 and less than 50,000 people.

Mid-MO RPC Urban Areas (UAs)

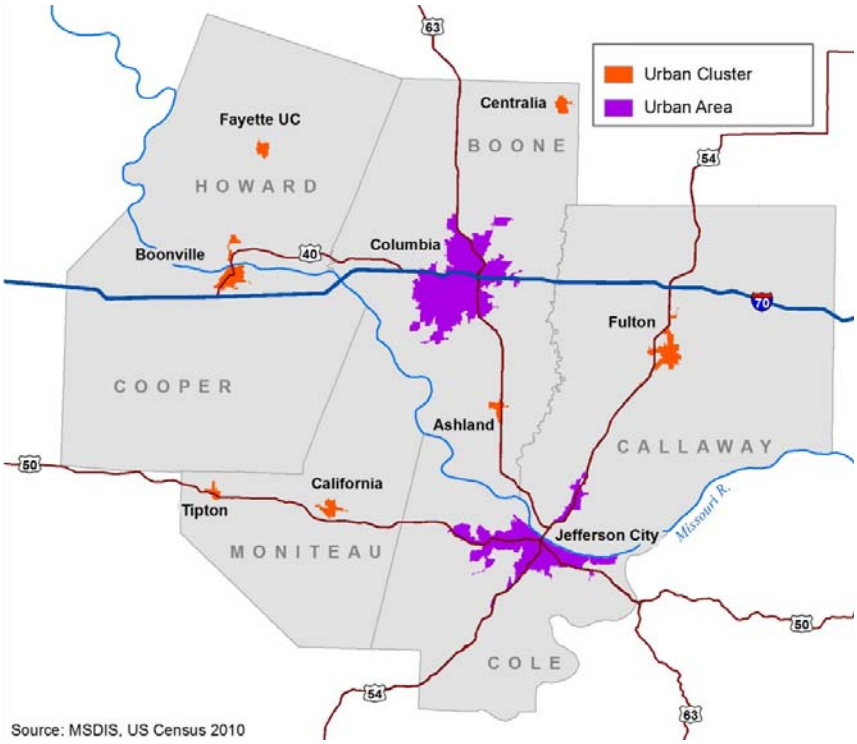
- Columbia (includes parts of City of Columbia)
- Jefferson City (includes parts of Holts Summit, Jefferson City, Lake Mykee, and St. Martins)

Mid-MO RPC Urban Clusters (UCs) – Note: the UCs may only contain part of the city and part of the unincorporated area.

- Ashland
- Boonville
- California
- Centralia
- Fayette
- Fulton
- Tipton

All UAs and UCs experienced growth between 1990 and 2010. Columbia experienced the most growth of any UA or UC in Mid-Missouri with a 52% increase of population between 1990 and 2010. It should be noted that Ashland was not listed as an Urban Cluster in the 2000 US Census. It is the fastest growing community in the Mid-MO RPC region with the city experiencing a growth rate of 98% between 2000 and 2010.

**Figure 1.12 Mid-Missouri Urban Areas and Urban Clusters 2010**



## Rural

"Rural" encompasses all population, housing, and territory not included within an urban area. There are no counties in Missouri that are 100% urban, except the independent city of St. Louis. Of the 114 other counties in the state, only 33 are classified as being entirely rural.

97.4% of the land area in the state of Missouri is classified as rural (per the 2000 Census). But only 30.6% of the population is classified as living in rural areas. Thus, almost 70% of the population of the state lives in about 2.6% of the land. Nationwide, the same 97.4% of the land area is classified as rural, but only about 21% of the population lives in these rural areas.

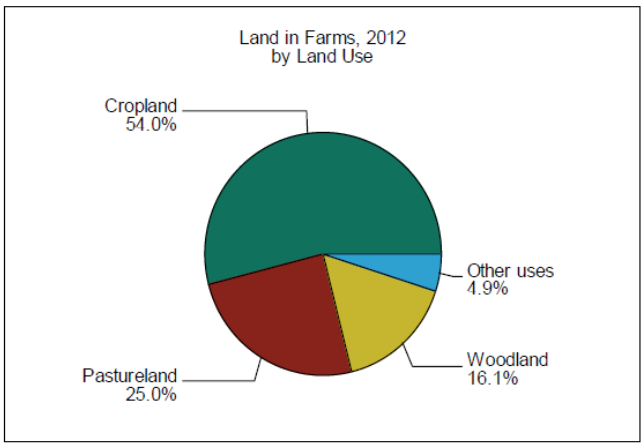
In Mid-Missouri, 32% of the population lives in rural areas. In 1990 it was 35% and in 2000 it was 34%. Similar to the state and national statistics, 97% of the Mid-MO RPC region is considered rural.

## Agricultural Land Use

According to the 2012 USDA Census of Agriculture, the number of Missouri farms decreased from 107,825 in 2007 to 99,171 in 2012, an 8% percent decrease. That is in contrast to the 9% percent increase from 1998 to 2007. The land area dedicated to farms decreased by 3% statewide, and the average size of farms increase by 6% to 285 acres.

Of the 2,174,354 acres in the Mid-MO RPC region, 70% of that land is dedicated to agricultural uses. This is slightly higher that the state's 64.6% percent and indicates a strong agricultural influence in the area. Figure 1.13 gives an overview of agricultural land use in the Mid-MO RPC Region. Figures 1.14 shows the number and size of farms in the Mid-MO Region and in Missouri.

**Figure 1.13 Mid-MO Region, Ag Land Use**




*Source: 2012 Census of Agriculture*

**Figure 1.14 Mid-Missouri Farms, Number and Size**

| | Number of Farms | | | Total Farmland (Acres) | | | Average Farm Size (Acres) | | |
|---|---|---|---|---|---|---|---|---|---|
| County | 2012 | 2007 | % Change | 2012 | 2007 | % Change | 2012 | 2007 | % Change |
| Boone | 1,171 | 1,322 | -11 | 240,710 | 258,734 | -7 | 206 | 196 | 5 |
| Callaway | 1,417 | 1,503 | -6 | 316,066 | 322,929 | -2 | 223 | 215 | 4 |
| Cole | 1,055 | 1,103 | -4 | 176,306 | 180,840 | -3 | 167 | 164 | 2 |
| Cooper | 928 | 942 | -1 | 307,128 | 302,429 | 2 | 331 | 321 | 3 |
| Howard | 765 | 867 | -12 | 243,420 | 276,590 | -12 | 318 | 319 | 0 |
| Moniteau | 1,089 | 1,138 | -4 | 235,204 | 242,946 | -3 | 216 | 213 | 1 |
| Mid-MO RPC Region | 6,425 | 6,875 | -7 | 1,518,834 | 1,584,468 | -4 | 1,461 | 1,428 | 2 |
| Missouri | 99,171 | 107,825 | -8 | 28,266,137 | 29,026,573 | -3 | 285 | 269 | 6 |

*Source: U.S. Census Bureau, 2012 Census of Agriculture*

## Public Land

Within in the Mid-MO RPC region there are 75,626 acres or 118 square miles of state or federal public land. This public land is held by the following agencies:

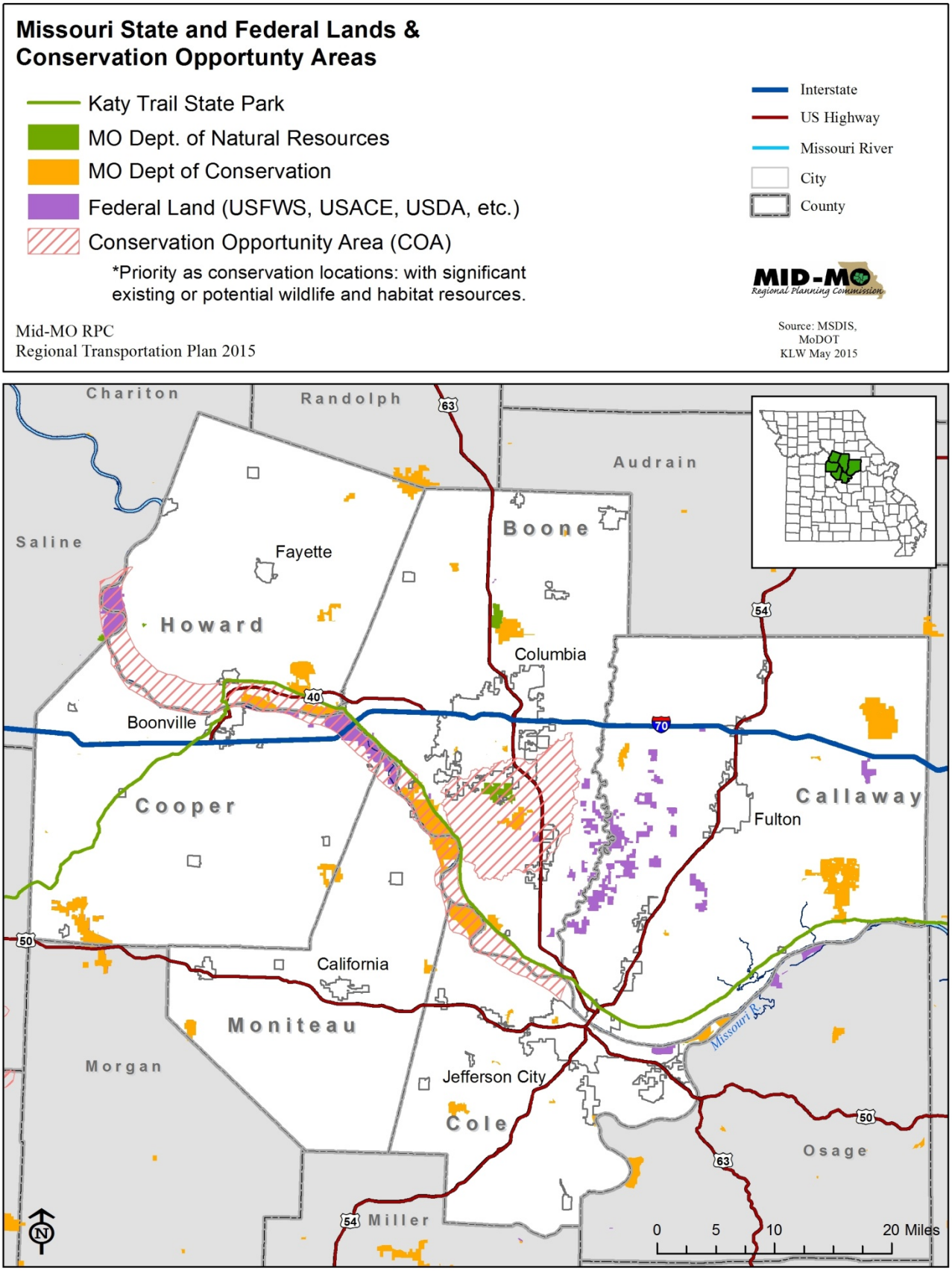
**Figure 1.15 Mid-MO RPC Region Public Land**

| Agency | Acres | % of Mid-MO region |
|---|---|---|
| Missouri Department of Conservation | 47,258 | 2% |
| Missouri Department of Natural Resources | 3,257 | .1% |
| US Fish and Wildlife Service | 4,213 | .2% |
| US Army Corps of Engineers | 5,549 | .2% |
| US Department of Agriculture – US Forest Service | 15,349 | .7% |

*Source: MSDIS, USFS, USFWS, MDC, MoDNR, USACE*

State and federal public land in the region represent areas that should be considered in economic development and transportation planning. These areas are usually difficult to perform construction in or around and special considerations on environmental impacts may present a challenge to development. Figure 1.16 portrays a graphic representation of where these areas are located in the Mid-MO RPC Region.

**Figure 1.16 Missouri State and Federal Lands & Conservation Opportunity Areas in Mid-MO RPC Region**

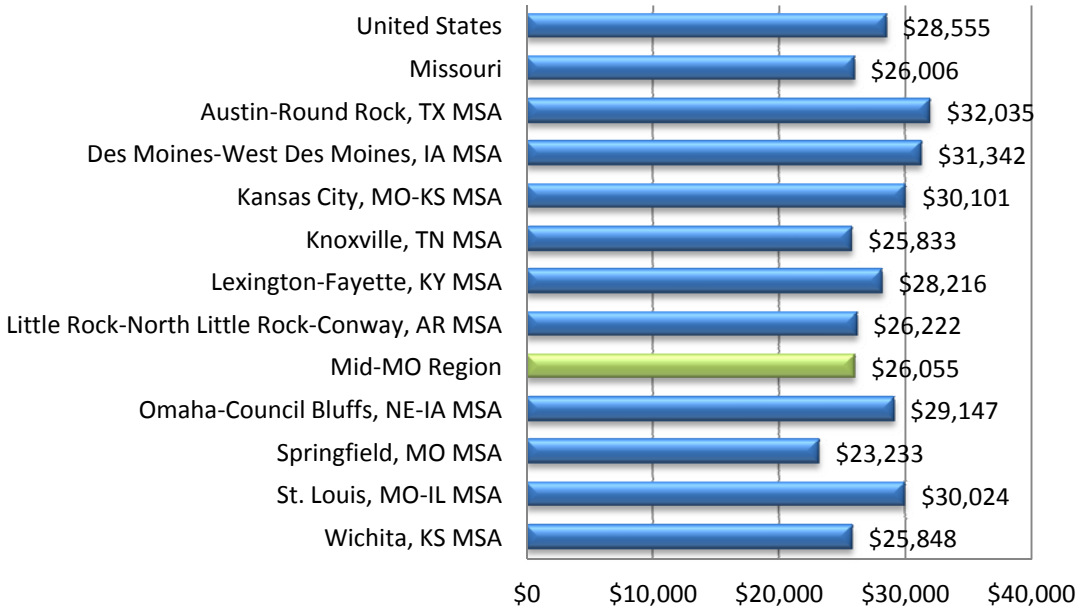


## Quality of Life

### Per Capita Income

The per capita income for the Mid-MO Region as a whole is similar to the per capita income of Missouri as a whole but well below U.S. per capita income. Per capita income levels in Mid-Missouri are also considerably lower than several other regions in which Mid-Missouri competes for economic prospects, including St. Louis, Kansas City, Des Moines, and Austin.

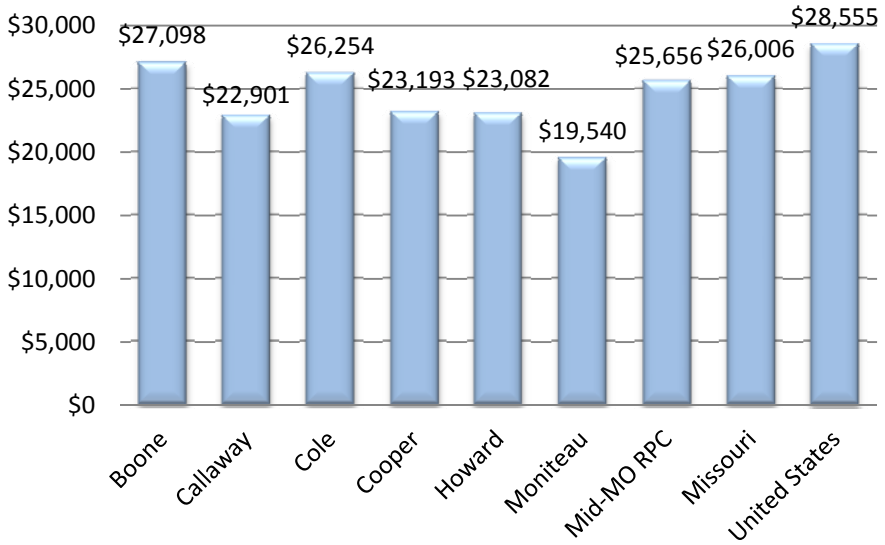
**Figure 1.17 National Per Capita Income Comparison**




*Source: American Community Survey 5-year Estimates, 2010-2014*

Figure 1.18 shows that while per capita income in all Mid-Missouri counties falls below the national per capita income, per capita income in Boone and Cole counties exceeds statewide per capita income.

**Figure 1.18 Mid-MO County-by-County Per Capita Income Comparison**




*Source: American Community Survey 5-year Estimates, 2010-2014*

## Wages

### Minimum Wage

Minimum Wage in Missouri is $7.65 per hour. This is slightly higher than the federal minimum wage of $7.25 per hour. No city in the Mid-Missouri Region has a minimum wage exceeding the state minimum wage.

**Figure 1.19 Minimum Wage**

| | |
|---|---|
| Federal | $7.25 |
| Missouri | $7.65 |

*Source: U.S. Department of Labor, 2016*

### Mean Hourly Wage Rates

Figure 1.20 is a comparison of mean hourly wage rates for a variety of occupations. It shows employers that Mid-Missouri offers competitive wages for a variety of occupations when compared to the nearby MSAs of St. Louis and Kansas City and to the national average.

**Figure 1.20 Mean Hourly Wage Rates for U.S. and Local MSAs**

| Occupation Title | U.S. Average | Columbia | Jefferson City | St. Louis | Kansas City |
|---|---|---|---|---|---|
| Bookkeeping, Accounting, and Auditing Clerks | $17.51 | $18.81 | $14.65 | $18.50 | $18.37 |
| Computer Programmers | $37.28 | $30.91 | $35.74 | $38.71 | $35.03 |
| Database Administrators | $38.60 | $29.47 | $26.20 | $41.19 | $36.49 |
| First-Line Supervisors of Production and Operating Workers | $26.69 | $27.84 | $28.11 | $28.52 | $27.07 |
| Industrial Machinery Mechanics | $23.38 | $26.94 | $24.85 | $24.98 | $24.17 |
| Laborers and Freight, Stock, and Material Movers, Hand | $11.74 | $13.31 | $12.67 | $14.40 | $13.53 |
| Office Clerks, General | $13.78 | $14.08 | $13.24 | $15.49 | $14.93 |
| Receptionists and Information Clerks | $12.87 | $12.60 | $12.35 | $12.75 | $13.85 |
| Assemblers and Fabricators, All Other | $14.08 | $12.47 | $10.15 | $11.66 | $14.44 |
| Heavy and Tractor-Trailer Truck Drivers | $19.00 | $19.81 | $16.52 | $19.98 | $21.28 |

*Source: U.S. Bureau of Labor Statistics, May 2014 Wage Estimates*

## Cost of Living

The most reliable cost of living comparison data is provided by the Council for Community and Economic Research (C2ER). C2ER's Cost of Living Index (COLI) is recognized by the U.S. Census Bureau, US Bureau of Labor Statistics and the President's Council of Economic Advisors.

COLI data is only available for a limited number of Metropolitan Statistical Areas (MSAs), and in the Mid-Missouri Region data is only available for the Columbia MSA and Jefferson City MSA. Combined this data represents 4 of the 6 Mid-Missouri RPC counties plus Osage County.

Figures 1.21, 1.22 and 1.23 compare the cost of living in the Columbia MSA and Jefferson City MSA with the national average cost of living, Missouri cost of living, and the cost of living in multiple other MSAs in Missouri and around the country. COLI data shows the national average cost of living as a score of 100. Any score below 100 is lower than the national average and any score above 100 is above the national average.

**Figure 1.21 Cost of Living - Third Quarter 2015**

| Metro | Index | Grocery | Housing | Utilities | Trans. | Health | Misc. |
|---|---|---|---|---|---|---|---|
| **Columbia MO** | 94.5 | 94 | 89.3 | 97.2 | 90.1 | 101.4 | 99.2 |
| **Jefferson City MO** | 91.6 | 93.9 | 78 | 100.9 | 92 | 98.5 | 98.5 |
| **Joplin MO** | 85.5 | 89.4 | 71 | 117.7 | 96.5 | 91.6 | 81 |
| **Kansas City MO-KS** | 93.7 | 98.7 | 89.1 | 85.9 | 101.3 | 92.4 | 95.4 |
| **Springfield MO** | 89 | 93.8 | 71.1 | 102.8 | 97.7 | 98.3 | 93.6 |
| **St. Louis MO-IL** | 92.7 | 105.9 | 71.5 | 119.4 | 99.9 | 96.7 | 93.7 |
| **Missouri** | 91.2 | 96 | 78.3 | 104 | 96.3 | 96.5 | 93.6 |
| **US Average** | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

*Source: The Council for Community and Economic Research (C2ER) & Missouri Economic Research and Information Center (MERIC)*

**Figure 1.22 Columbia and Jefferson City MSAs Cost of Living Compared to National Average**

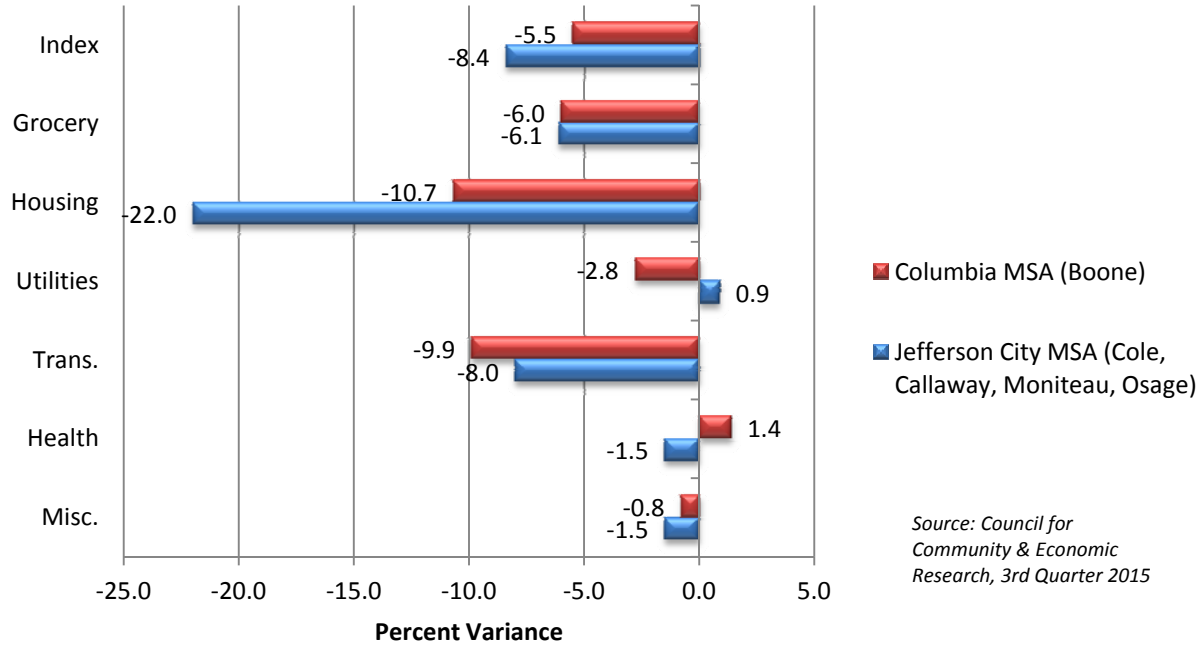
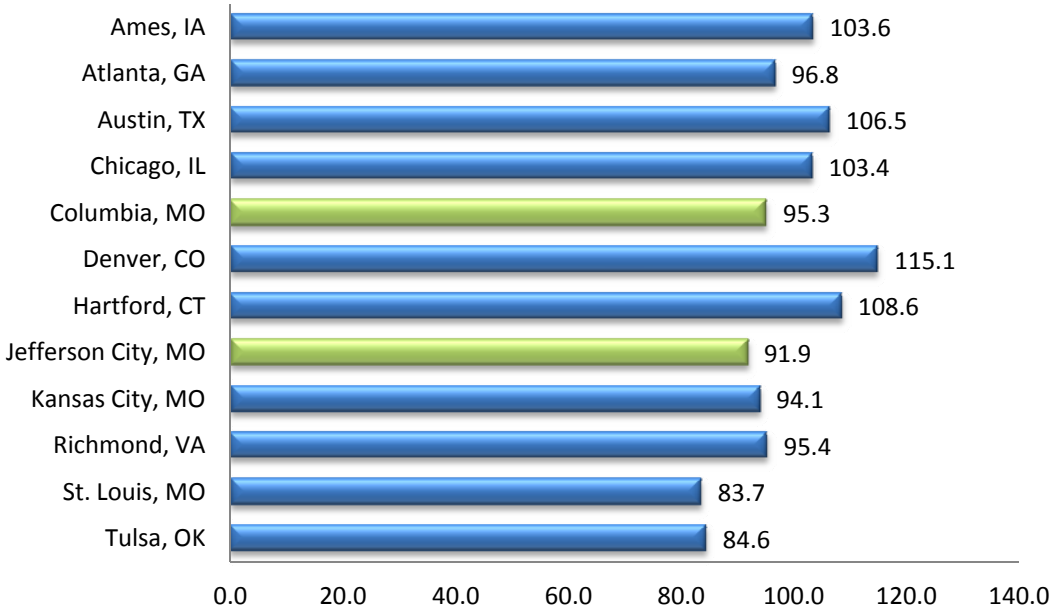


**Figure 1.23 Cost of Living Index - 2014 Averages, by MSA**




*Source: Council for Community & Economic Research, 3rd Quarter 2015*

## Poverty

According to the Small Area Income and Poverty Estimates produced by the U.S. Census Bureau, poverty rates in Mid-MO RPC Region tend to be near or below the national average. Boone County, however, is the major exception to trend. Almost 1 in 5 Boone County residents lived at or below the line in 2014.

As shown in Figures 1.24 and 1.25, poverty is growing at a rate faster than the national average in Boone, Cole and Callaway counties. Poverty rates in the U.S. as a whole increased by 4.2% between 2000 and 2014. During this same period the Boone County poverty rate increased by 9.3%, Cole County increased by 5.9% and Callaway County Poverty increased by 4.6%.

**Figure 1.24 Percent of Population Living in Poverty**

| Year | Boone | Callaway | Cole | Cooper | Howard | Moniteau | Missouri | United States |
|---|---|---|---|---|---|---|---|---|
| 2000 | 10.2% | 9.6% | 7.4% | 10.9% | 12.4% | 9.9% | 10.6% | 11.3% |
| 2014 | 19.5% | 14.2% | 13.3% | 14.0% | 15.6% | 13.9% | 15.5% | 15.5% |

*Source: USDC, Bureau of the Census, Small Area Income and Poverty Estimates*

**Figure 1.25 Mid-MO Poverty Trends, 2000-2014**

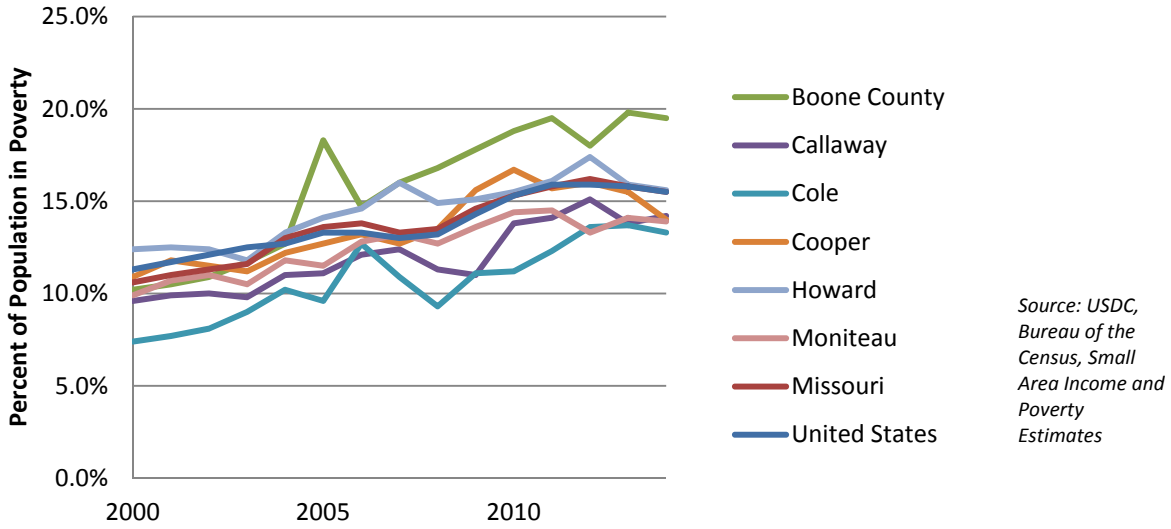



Figure 1.26 shows that Boone County also exceeds the national average in terms of the numbers of residents living well below the poverty line. More than 1 in 10 Boone County residents live at 50% or below the poverty level.

**Figure 1.26 Percent of Population Living at 50% of Poverty Line or Less**

| Year | Boone | Callaway | Cole | Cooper | Howard | Moniteau | Missouri | United States |
|---|---|---|---|---|---|---|---|---|
| 2014 | 11.2% | 6.3% | 5.8% | 4.9% | 7.2% | 4.1% | 6.8% | 6.9% |

*Source: USDC, Bureau of the Census, American Community Survey 5-year Estimates, 2010-2014*

Figures 1.24 and 1.26 also show that today there is a greater percentage of the Boone County residents living at 50% of the poverty line or less than the percentage of people living at 100% of the poverty line or less in 2000.

## Commuting

Figure 1.27 shows that commute times around Mid-Missouri tend to be less than the national average. The national average mean travel time to work is 25.7 minutes and 42.9% of the population commutes 20 minutes or less to work. Every county in the Mid-MO Region has a mean commute time less than the national average and five of the six Mid-MO RPC counties have a greater percentage of their population commuting 20 minutes or less to work than the national average. In Boone and Cole counties, more than 60% of the workforce commutes less than 20 minutes to work.

**Figure 1.27 Mid-MO RPC Travel Time to Work**

| | Boone | Callaway | Cole | Cooper | Howard | Moniteau | Missouri | U.S. |
|---|---|---|---|---|---|---|---|---|
| Less than 10 minutes | 16.3% | 16.7% | 19.4% | 27.6% | 24.4% | 20.6% | 15.9% | 13.3% |
| 10 to 14 minutes | 22.4% | 15.1% | 26.0% | 12.4% | 9.9% | 9.4% | 15.0% | 14.1% |
| 15 to 19 minutes | 25.1% | 19.9% | 23.4% | 8.3% | 14.5% | 10.6% | 16.2% | 15.5% |
| 20 to 24 minutes | 15.0% | 13.3% | 12.1% | 10.7% | 7.6% | 11.3% | 15.2% | 14.8% |
| 25 to 29 minutes | 4.9% | 7.1% | 3.3% | 5.2% | 3.3% | 9.0% | 6.7% | 6.2% |
| 30 to 34 minutes | 7.5% | 12.7% | 6.5% | 15.3% | 14.4% | 16.3% | 13.2% | 13.7% |
| 35 to 44 minutes | 3.5% | 6.9% | 3.9% | 9.0% | 11.1% | 7.7% | 6.3% | 6.5% |
| 45 to 59 minutes | 3.1% | 5.7% | 3.7% | 7.5% | 10.8% | 9.4% | 6.5% | 7.7% |
| 60 or more minutes | 2.1% | 2.6% | 1.6% | 4.1% | 4.0% | 5.8% | 5.0% | 8.3% |
| Mean travel time to work (minutes) | 18.1 | 21.4 | 17.2 | 22.1 | 23.3 | 25 | 23.1 | 25.7 |

*Source: USDC, Bureau of the Census, American Community Survey, 2014 5-year Estimates*

Figure 1.28 shows the modes of transportation to work used by Mid-Missouri workers and compares them to state and national averages. Each county in Mid-Missouri has a larger percentage of its population taking a car, truck or van to work than the state and national averages; however, each county also has a greater percentage of their populations that carpool than the state and national average. Public transportation is infrequently used as a mode of transportation to work in all Mid-Missouri counties. Nationally, 5.1% of the population takes public transportation to work, but less than 1% of the population in each Mid-Missouri county utilizes public transportation work commuting to work.

**Figure 1.28 Mid-MO RPC Means of Transportation to Work**

| | Boone | Callaway | Cole | Cooper | Howard | Moniteau | Missouri | U.S. |
|---|---|---|---|---|---|---|---|---|
| Car, truck, or van | 88.8% | 93.5% | 94.1% | 92.4% | 91.3% | 92.6% | 91.0% | 86.0% |
| Drove alone | 78.4% | 83.7% | 83.1% | 81.8% | 79.2% | 74.4% | 81.6% | 76.4% |
| Carpooled | 10.4% | 9.8% | 11.1% | 10.6% | 12.0% | 18.2% | 9.4% | 9.6% |
| Public transportation (excluding taxi) | 0.8% | 0.1% | 0.2% | 0.1% | 0.1% | 0.0% | 1.5% | 5.1% |
| Walked | 4.7% | 1.6% | 1.2% | 2.9% | 2.5% | 2.2% | 2.0% | 2.8% |
| Bicycle | 1.0% | 0.1% | 0.1% | 0.0% | 0.2% | 0.7% | 0.3% | 0.6% |
| Taxicab, motorcycle, or other means | 0.9% | 0.7% | 1.6% | 1.1% | 0.6% | 0.9% | 1.0% | 1.2% |
| Worked at home | 3.8% | 3.9% | 2.7% | 3.4% | 5.3% | 3.6% | 4.3% | 4.4% |

*Source: USDC, Bureau of the Census, American Community Survey, 2014 5-year Estimates*

## Crime Rates

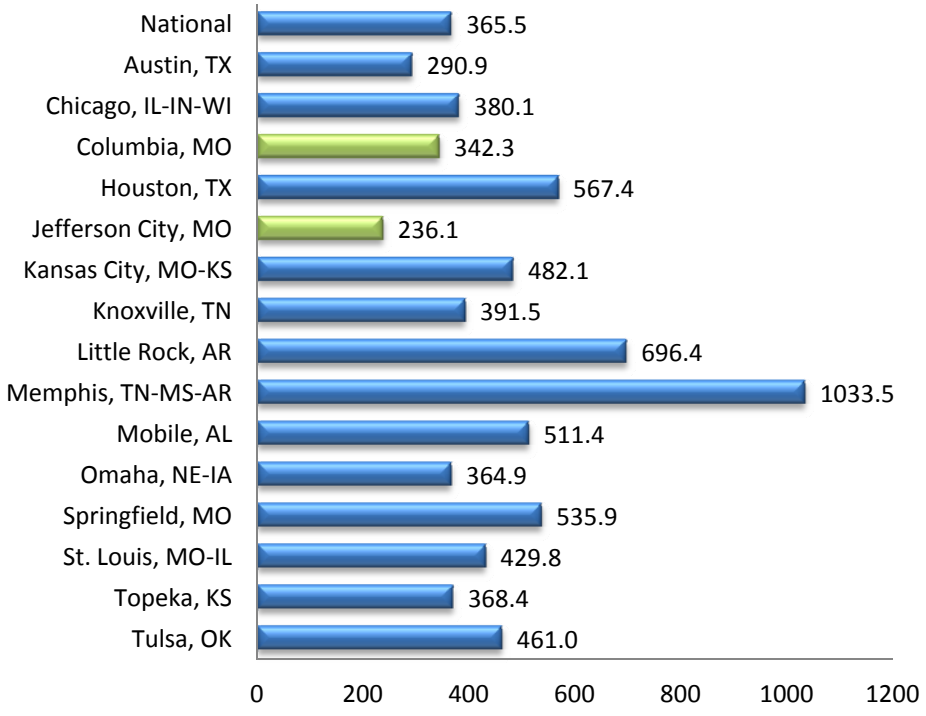
Crime rate data is extracted from the annual FBI Uniform Crime Report (UCF). UCF data is most readily available at the MSA level. Figure 1.29 and Figure 1.30 show the Columbia MSA and Jefferson City MSA crime rates tend to be lower than both the national average crime rate and the crime rate in many other MSAs throughout the country. The Jefferson City MSA, in particular, has crime rates much lower than the national average in each category measured by the UCF.

**Figure 1.29 Detailed Crime Rate Comparison (incidents per 100,000 people)**

| | Columbia MSA | Jefferson City MSA | National Average |
|---|---|---|---|
| Violent Crime | 342.3 | 236.1 | 365.5 |
| Murder | 3.5 | 4.0 | 4.5 |
| Rape | 46.3 | 15.3 | 36.6 |
| Robbery | 75.8 | 30.5 | 102.2 |
| Aggravated Assault | 216.8 | 186.3 | 232.5 |
| Property Crimes | 2974.0 | 1953.5 | 2596.1 |
| Burglary | 526.2 | 356.1 | 542.5 |
| Larceny-Theft | 2317.1 | 1509.2 | 1837.3 |
| Motor Vehicle Theft | 130.7 | 88.2 | 216.2 |

*Source: Federal Bureau of Investigation, Uniform Crime Report, 2014*

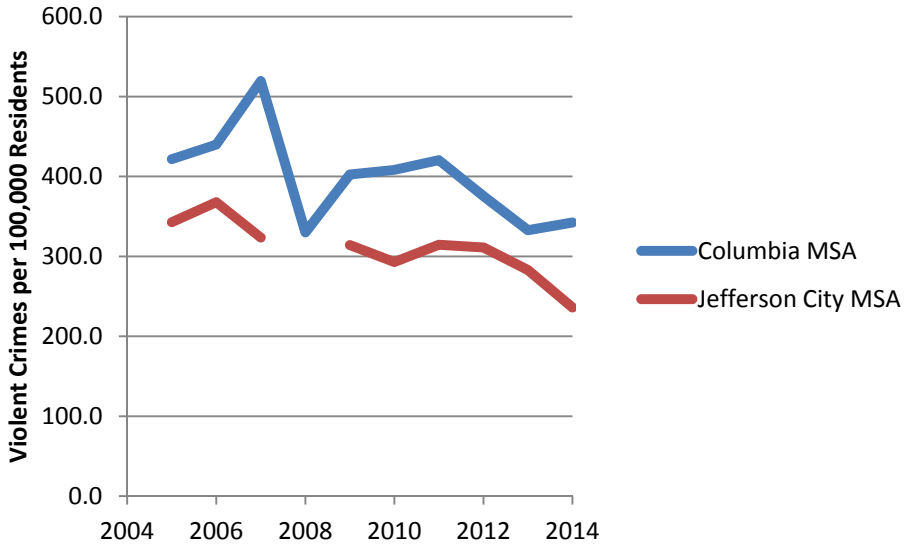
**Figure 1.30 MSA Violent Crime Rate Comparison (incidents per 100,000 people)**




*Source: Federal Bureau of Investigation, Uniform Crime Report, 2014*

Figure 1.31 shows that violent crime rates in the Columbia MSA and Jefferson City MSA are trending down over the last 10 years.

**Figure 1.31 Violent Crime Rate, 2005-2014 (incidents per 100,000 people)**




*Source: Federal Bureau of Investigation, Uniform Crime Report, 2005-2014*

## Healthcare

The Mid-Missouri region is home to several high quality hospitals and clinics. University of Missouri Hospital is the only Level 1 Trauma Center in Missouri outside of St. Louis and Kansas City. University Hospital & Clinics, Boone Hospital Center, SSM Health - St. Mary's Hospital, and Capital Region Medical Center are all either currently undergoing major expansions or have completed major expansions within the last three years. These facilities have each earned multiple awards for excellence in care.

Figure 1.32 lists the hospitals in the Mid-MO RPC Region and the number of beds available at each facility.

**Figure 1.32 Hospitals in Mid-MO RPC Region**

| Hospital | # of Beds | County |
|---|---|---|
| Boone Hospital Center | 397 | Boone |
| University of Missouri Health Care | NA | Boone |
| University Hospital & Clinics | 361 | Boone |
| Women's and Children's Hospital | 126 | Boone |
| Ellis Fischel Cancer Center | NA | Boone |
| Missouri Psychiatric Center | 57 | Boone |
| Missouri Orthopaedic Institute | NA | Boone |
| Harry S. Trumann Memorial Veterans' Hospital | 123 | Boone |
| Rusk Rehabilitation Center | 60 | Boone |
| Landmark Hospital of Columbia | 42 | Boone |
| Fulton State Hospital | 376 | Callaway |
| Fulton Medical Center | 37 | Callaway |
| SSM Health St. Mary's Hospital - Jefferson City | 154 | Cole |
| Capital Region Medical Center | 114 | Cole |
| Cooper County Memorial Hospital | 70 | Cooper |

NA: Not Available

*Source: Missouri Department of Health and Senior Services; Missouri Department of Mental Health; Boone County Hazard Mitigation Plan, 2015; University of Missouri Health Care*

## Recreation & Tourism

The diverse and numerous possibilities for entertainment and leisure activities in the region are a major attribute to quality of life in the region. These recreational opportunities not only make the region a pleasant place to live, but many also serve as generators of tourist dollars by attracting visitors to the region.

**Outdoor Recreation**

The Missouri State Park system is consistently ranked among the top state park systems in the nation. There a numerous Missouri State Parks in and just outside of the Mid-Missouri region that make great day trips for Mid-Missouri residents.

- Missouri State Parks have been a finalist for the National Recreation and Park Association Gold Medal Award in 2011, 2013 and 2015.
- Missouri has been named the "Best Trails State" by American Trails, a national, nonprofit organization working on behalf of the nation's hiking, biking and riding trails. The national award is presented every two years to the state that has made tremendous contributions to promote and improve their trails system.
- Missouri State Parks was recently awarded nine Certificates of Excellence by TripAdvisor. This prestigious award recognizes establishments that consistently receive great TripAdvisor reviews from travelers. Missouri state parks and historic sites receiving the recognition are: Bennett Spring State Park, Castlewood State Park, Deutschheim State Historic Site, Elephant Rocks State Park, Ha Ha Tonka State Park, Johnson's Shut-Ins State Park, Roaring River State Park, Rock Bridge Memorial State Park, and Table Rock State Park and State Park Marina.

Hiking and biking trails are a real quality of life asset for the Mid-Missouri region.

- The Katy Trail is the nation's longest rails-to-trails project, stretching 237 across the state. It follows the Missouri River through Mid-Missouri and runs through many Mid-Missouri communities along the way. Rock Bridge State Park, located just outside of Columbia, was one of nine Missouri State parks recently awarded a Certificate of Excellence by Trip Advisor. Rock Bridge is a favorite hiking destination for many people in the area. The MKT Trail in Columbia is a
- The MKT is Columbia's premiere trail. This 10-foot wide trail built on the old rail bed of the MKT railroad begins in downtown Columbia and extends approximately 9 miles where it connects to the Katy Trail. The all-weather crushed limestone surface provides opportunities for walking, jogging, running, and bicycling.
- Runge Nature Center in Jefferson City is a 100-acre site that features a visitor center with exhibits and live-animal displays, special events, demonstrations and diverse natural habitats. It also has two and half miles of popular hiking trails.
- The Jefferson City Greenway is approximately 15 miles of greenway trail throughout the capital city. The Greenway trail system is always expanding by connecting parks, neighborhoods, schools and businesses throughout the city.

**Cultural Activities**

The large number of higher education institutions in the region contributes to the plethora of cultural activities in the region. Mid-Missouri has several venues for viewing live theatre, multiple museums can be considered hidden treasures within the region, and nationally recognized film festivals.

Professional theatre can be found in nearby Arrow Rock, just outside of the Mid-MO RPC region. The Lyceum Theatre offers professional theatrical productions throughout the summer and early fall. Many of the local universities have theatre departments that perform throughout the year, including Stephens

College which has the 11th ranked theatre department in the country. Jefferson City and Columbia both also have vibrant local theatre cultures with multiple community theatre groups performing in each community.

The National Churchill Museum is located on the Westminster College campus in Fulton. The National Churchill Museum brings to life the story of Winston Churchill and the world he knew through imaginative and innovative use of technology. Recently rebuilt from the ground up, the new displays and the permanent exhibition, together with a host of associated historical and cultural activities that support it, was recognized by the United States Congress as America's permanent tribute to Churchill and formally designated it as America's National Churchill Museum.

True / False and Citizen Jane are two documentary film festivals in Columbia that have increasingly gathered national and even international recognition. The True / False film festival, in particular, brings in visitors from around the country. In 2015, attendance at True / False was over 45,000.

**Sports and Gaming**

Sporting events and gaming plays a major role in the Mid-Missouri tourism economy. The University of Missouri sporting events and the Isle of Capri Casino in Boonville are the largest tourism draws in Mid-Missouri.

University of Missouri Athletics attracts tens of thousands of visitors each year to Mid-Missouri. A study conducted by Trulaske College of Business' MBA program explains the economic impact of Mizzou Athletics and the effect of the university's transition from the Big XII Conference athletics to the Southeastern Conference. The study shows that the economic impact of the University of Missouri Athletic Department was $247 million in fiscal year 2013 when direct, indirect and induced costs are taken into account. That number is up from $164 million of total economic impact in fiscal year 2009.

Boonville is the city most reliant on tourism in the Mid-Missouri region. The Isle of Capri Casino and Hotel is the community's largest employer with over 700 employees. The City of Boonville is also benefited greatly by the tax revenue that the casino brings into the community. Warm Springs Ranch, located just outside of Boonville, is a breeding farm for the Budweiser Clydesdales. Warm Springs Ranch visitors tours from March to November which are popular tour bus destination.

**Wineries and Microbreweries**

Missouri has a thriving wine industry with 1,700 acres of grapes and more than 125 wineries. According the Missouri Wine and Grape Board, in 2013 there were 950,000 wind-related tourists in Missouri which resulted in $220 million in wine-related tourism expenditures.

The Missouri River Wine Trail, one of ten wine trails in Missouri, runs through the heart of the Mid-Missouri region. Mid-Missouri wineries located in Rocheport, Fulton and Holts Summit are part of the Missouri River Wine Trail. The Mid-Missouri region is also near the Hermann and Lake of the Ozarks Wine Trails. More information about the Missouri River Wine Trail can be found at missouririverwinetrail.com.

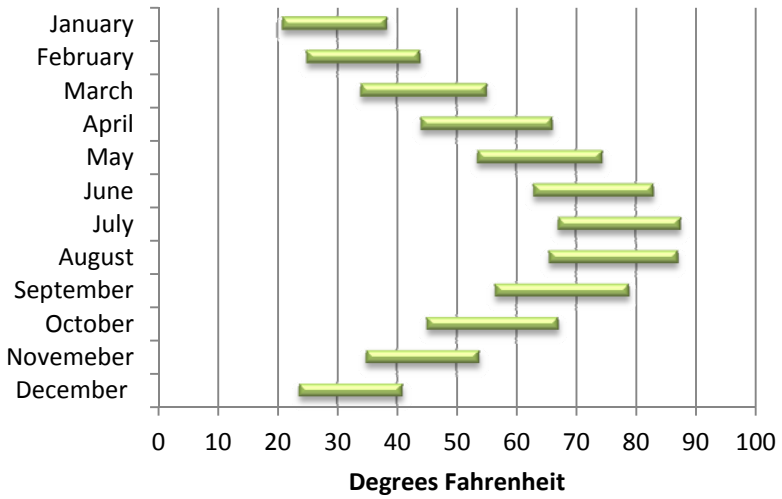
Nation trends show that craft beer sales are increasing at a dramatic rate. According to the Brewers Association, 2014 saw a 17.6% increase in craft beer sales. Missouri ranks 16th in the country in craft beer production. Mid-Missouri is following this national trend, with multiple microbreweries and brewpubs in Columbia and Jefferson City.

# Climate

## Average Temperatures

Average temperatures in Mid-Missouri range from the low 20s to low 40s in December and January to the mid to upper 90s in July and August.

**Figure 1.33 Mid-MO Region Average High & Low Temperatures**




*Source: National Climate Data Center, 1981-2010 Climate Normals; Columbia Regional Airport*

**Figure 1.34 Mid-MO Region Seasonal Temperatures**

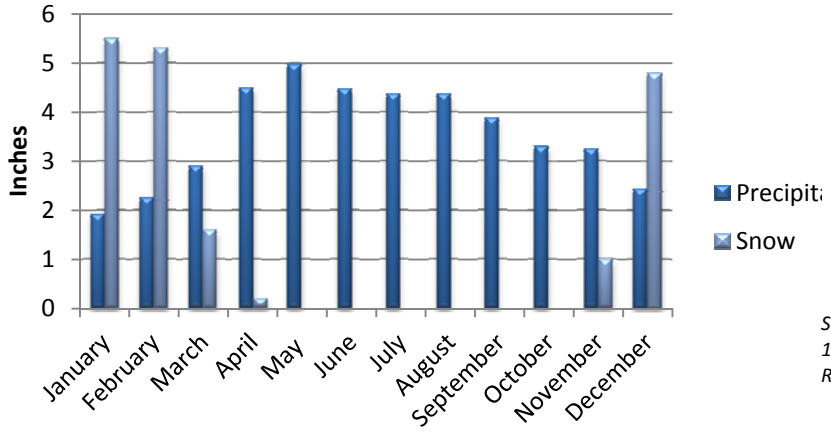
| Season | Min. Temp. (°F) | Max. Temp. (°F) | Avg. Temp. (°F) |
|---|---|---|---|
| Spring | 44 | 65 | 55 |
| Summer | 65 | 86 | 76 |
| Fall | 46 | 67 | 56 |
| Winter | 23 | 41 | 32 |
| Annual | 45 | 65 | 55 |

*Source: National Climate Data Center, 1981-2010 Climate Normals; Columbia Regional Airport*

## Average Precipitation

Average total precipitation for the Mid-MO RPC region is 46.62 inches per year and average snowfall is 18.40 inches per year.

**Figure 1.35 Mid-MO Average Precipitation and Snowfall**




*Source: National Climate Data Center, 1981-2010 Climate Normals; Columbia Regional Airport*

# B. Economy

## Gross Domestic Product (GDP)

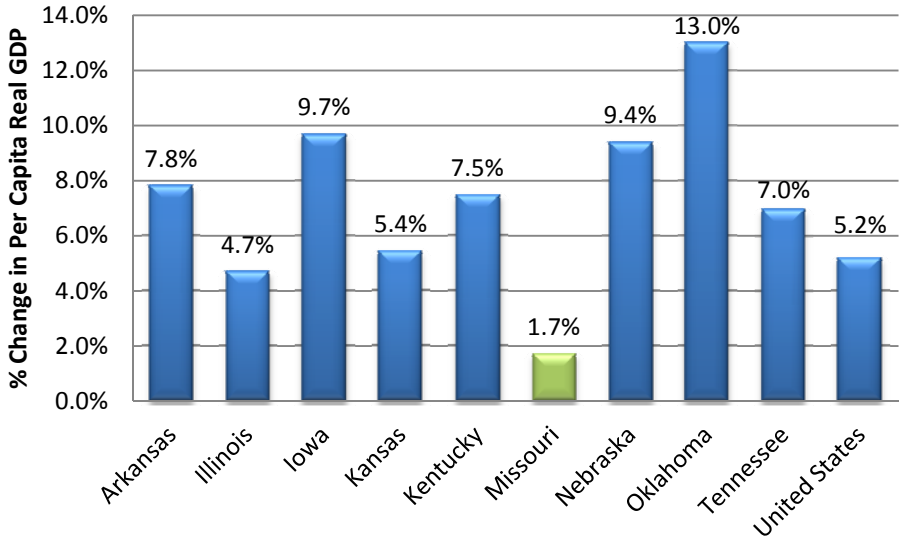
Between 2009 and 2014 national Real Per Capita GDP grew by 5.2%. According to the Bureau of Economic Analysis, Missouri's grew by 1.7%, 33rd among the 50 states. Meanwhile, all of Missouri's neighboring states grew faster. Three of Missouri's neighbors (Oklahoma, Iowa and Arkansas) were had Real Per Capita GDP growth rates that put them in the top 10 in the nation.

**Figure 2.0 MO Real Per Capita GDP Ranking Compared to Top 10 States 2009-2014 (2009 dollars)**

| Ranking | Area | 2009 | 2014 | % Change |
|---|---|---|---|---|
| 1 | North Dakota | $48,670 | $69,550 | 42.9% |
| 2 | Oklahoma | $38,568 | $43,588 | 13.0% |
| 3 | Michigan | $37,004 | $41,695 | 12.7% |
| 4 | Texas | $47,233 | $52,742 | 11.7% |
| 5 | Ohio | $41,453 | $46,137 | 11.3% |
| 6 | Iowa | $45,038 | $49,397 | 9.7% |
| 7 | Nebraska | $47,826 | $52,317 | 9.4% |
| 8 | Indiana | $40,775 | $44,539 | 9.2% |
| 9 | Minnesota | $49,129 | $53,499 | 8.9% |
| 10 | Arkansas | $34,554 | $37,252 | 7.8% |
| 33 | Missouri | $41,867 | $42,582 | 1.7% |
| NA | United States | $46,680 | $49,091 | 5.2% |

*Source: USDC, Bureau of Economic Analysis*

**Figure 2.1 Comparing MO Real Per Capita GDP Growth to Neighboring States 2009-2014 (2009 dollars)**




*Source: USDC, Bureau of Economic Analysis*

Real Per Capita GDP numbers are not available on a county level, but Figure 2.2 shows the numbers for the Columbia and Jefferson City Metropolitan Statistical Areas (MSAs). Jefferson City MSA is comprised of Cole, Callaway, Moniteau and Osage counties, while Columbia MSA is comprised of Boone County. Columbia is experiencing more growth in Real Per Capita GDP than Missouri as a whole, but it is still less than the nation as a whole.

**Figure 2.2 Columbia and Jefferson City MSA Change in Real Per Capita GDP 2009-2014 (2009 dollars)**

| Metropolitan Statistical Area (MSA) | 2009 | 2014 | % Change 2009-14 |
|---|---|---|---|
| Columbia, MO MSA | $40,835 | $42,525 | 4.1% |
| Jefferson City, MO MSA | $40,146 | $39,503 | -1.6% |

*Source: USDC, Bureau of Economic Analysis*

## Workforce and Employment

The Docking Institute of Public Affairs recently conducted a Labor Availability Analysis of the Columbia Missouri Labor Basin for Regional Economic Development, Inc. This study looked at labor availability in a nine county region in Mid-Missouri. The area analyzed in this study includes the six counties of the Mid-Missouri Regional Planning Commission plus three counties to the north including Audrain, Monroe and Randolph counties.

The workforce and employment section will use data from the Docking Institute study along with information from the Missouri Department of Economic Development, U.S. Bureau of Labor Statistics, American Community Survey and Missouri Department of Higher Education in order to identify the workforce and employment landscape in the Mid-Missouri Region.

### Labor Force

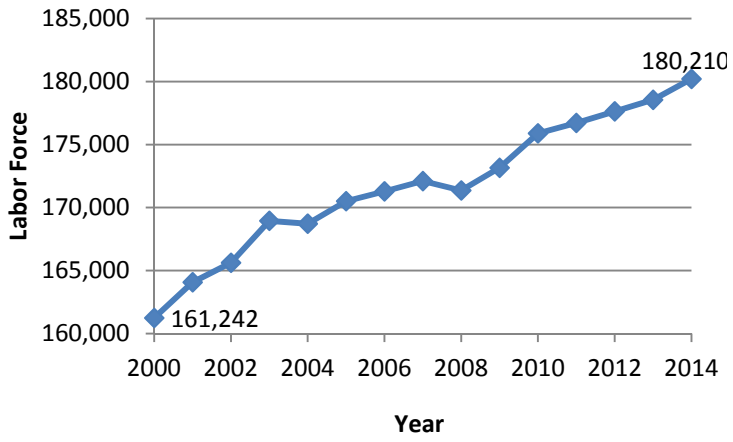
Figure 2.3 and Figure 2.4 depict both the size and growth in the Mid-MO RPC Region's labor force. The majority of the labor force in Mid-Missouri can be found in Boone County, with Cole and Callaway also having a strong labor force presence. Increases in the labor force are consistent with the trend in overall population growth in the region.

**Figure 2.3 Mid-MO RPC Regional Labor Force**

| Geography | Total Labor Force |
|---|---|
| Boone | 103,116 |
| Callaway | 21,773 |
| Cole | 39,986 |
| Cooper | 7,838 |
| Howard | 5,210 |
| Moniteau | 7,457 |
| Columbia MSA | 103,116 |
| Jefferson City MSA | 76,566 |
| Mid-MO Region | 185,380 |

*Source: Missouri Department of Economic Development / MERIC*

**Figure 2.4 Size of Labor Force for Mid-MO Region, 2000-2014**




*Source: USDC, Bureau of Labor Statistics, Local Area Unemployment Statistics, 2000-2014*

## Educational Attainment

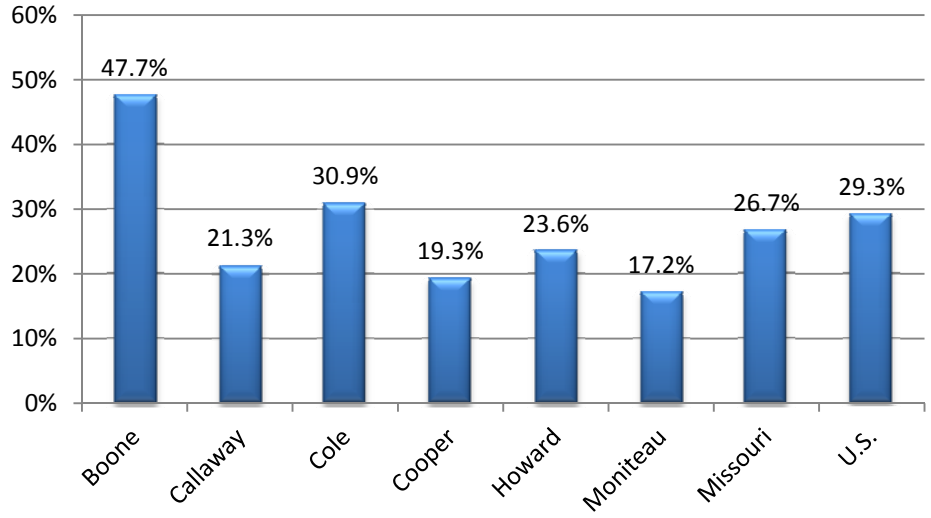
Mid-Missouri has a highly educated workforce. In Boone County -- where half of the Mid-Missouri workforce resides -- 47.6% of the population has at least a Bachelor's degree. Compare this to the nation as a whole where only 29.3% of the population has a bachelor's degree or higher. Cole County -- the region's second largest labor force -- also exceeds the national average for bachelor degree attainment.

**Figure 2.5 Mid-MO Educational Attainment**

| Educational Attainment | Boone | Callaway | Cole | Cooper | Howard | Moniteau | Missouri | U.S. |
|---|---|---|---|---|---|---|---|---|
| Less than HS Diploma | 6.8% | 13.3% | 9.5% | 12.3% | 13.6% | 17.7% | 12.0% | 13.6% |
| High school graduate (includes equivalency) | 19.7% | 37.9% | 30.9% | 40.1% | 37.0% | 42.7% | 31.4% | 28.0% |
| Some college, no degree | 19.4% | 21.1% | 21.0% | 20.6% | 19.5% | 17.3% | 22.7% | 21.2% |
| Associate's degree | 6.4% | 6.4% | 7.7% | 7.6% | 6.3% | 5.1% | 7.2% | 7.9% |
| Bachelor's degree | 27.2% | 14.1% | 20.4% | 13.2% | 15.6% | 11.9% | 16.7% | 18.3% |
| Graduate or professional degree | 20.4% | 7.2% | 10.5% | 6.1% | 7.9% | 5.3% | 10.0% | 11.0% |

*Source: USDC, Bureau of the Census, American Community Survey, 2014 5-year Estimates*

**Figure 2.6 Mid-MO RPC Population w/ Bachelors Degree or Higher**




*Source: USDC, Bureau of the Census, American Community Survey: 2014 5-year Estimates*

## Unemployment Rate

The unemployment rate in most Mid-Missouri counties is very low when compared to both the national and statewide unemployment rates. While this is a positive economic indicator for the region, economic development professionals in the region cite the low unemployment rate as a challenge to business attraction. Companies sometimes see low unemployment rates and anticipate that this will cause challenges meeting their workforce needs.

**Figure 2.7 Mid-MO Unemployment Rate**

| Geography | Unemployment Rate (Oct 2015)* |
|---|---|
| Boone | 2.9% |
| Callaway | 3.8% |
| Cole | 3.2% |
| Cooper | 4.9% |
| Howard | 3.9% |
| Moniteau | 4.0% |
| Columbia MSA | 2.9% |
| Jefferson City MSA | 3.5% |
| Missouri | 4.3% |
| United States | 4.8% |

*Source: Missouri Department of Economic Development / MERIC*

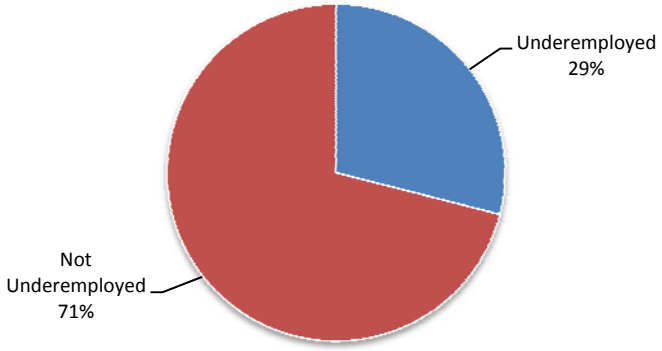
* Not seasonally adjusted

## Underemployment

Underemployment is defined as when a worker is employed at less than full-time or at less skilled tasks than their training or abilities permit.

The Docking Institute study of the Columbia Missouri Labor Basin analyzes underemployment in Mid-Missouri. The Docking Institute study finds that 29% of employed members of the Mid-Missouri available labor pool are underemployed. This data was collected through a random digit telephone survey that successfully contacted 1,587 households in the region. All data is self-reported.

**Figure 2.8 Mid-Missouri Underemployed Workers**

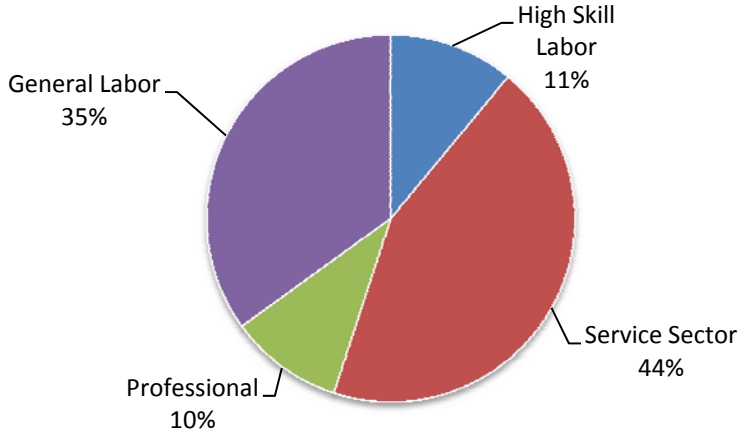



*Source: Columbia Missouri Labor Basin Labor Availability Analysis - 2015, The Docking Institute of Public Affairs*

As part of the Docking Institute study, when survey respondents were asked the reason they considered themselves underemployed almost 27% considered themselves underemployed because they have more education than is required in order to perform their current job. 24% reported that they possess skills that are not being currently used at their current job. 18% considered themselves underemployed because they had previously made more money at a past job that was similar to their current job, and 11% consider themselves underemployed because they are offered too few hours at work.

Figure 2.9 shows that the vast majority of currently underemployed workers are currently working in the service sector or as general laborers.

**Figure 2.9 Occupational Sectors of Underemployed Workers**




*Source: Columbia Missouri Labor Basin Labor Availability Analysis - 2015, The Docking Institute of Public Affairs*

## Economic Base

Higher education and state government are the largest employers in the Mid-Missouri region and serve as the cornerstones of the Mid-Missouri economy.

### Higher Education

Higher education is the single biggest driver of economic growth in Mid-Missouri. Columbia is home to the **University of Missouri**, the state of Missouri's flagship university. The University of Missouri is a $2.1 billion enterprise that accounts for 72% of the research dollars flowing through Missouri's public universities. MU boosts the economy by performing research, generating jobs, sharing knowledge, improving graduates' earning potential, and creating and commercializing businesses.

In FY2014, University of Missouri commercialization and tech transfer resulted in the following:

- $10.2+ million in gross licensing revenue
- 85 invention disclosures
- 322 MTAs executed
- 36 U.S. patents issued (577 since 2008)
- 107 U.S. technology patent applications filed
- 30 licenses and options executed
- 236 NDAs executed
- 291 licenses for new technologies signed since 2008
- 577 U.S. patents filed since 2008

In Mid-Missouri, the economic impact of higher education goes well beyond the University of Missouri. As shown in Figure 2.10 Mid-Missouri is home to several colleges, universities, and institutions of higher education.

**Figure 2.10 Enrollment Trends at Educational Institutions Located In or Near Mid-MO Region, Fall 2010-15**

| Type | Educational Institution | Annual Enrollment | | | | | | Enrollment Trends | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 1-year Change | 3-year Change | 5-year Change |
| Four-Year Institutions | University of Missouri-Columbia | 32,341 | 33,762 | 34,704 | 34,616 | 35,425 | 35,424 | 0.0% | 2.1% | 9.5% |
| | Lincoln University | 3,349 | 3,388 | 3,205 | 3,043 | 3,117 | 2,945 | -5.5% | -8.1% | -12.1% |
| | Columbia College | 16,962 | 18,091 | 17,830 | 16,946 | 16,576 | 14,778 | -10.8% | -17.1% | -12.9% |
| | Stephens College | 1,123 | 1,032 | 899 | 851 | 862 | 893 | 3.6% | -0.7% | -20.5% |
| | Westminster College | 1,167 | 1,102 | 1,084 | 1,039 | 944 | 930 | -1.5% | -14.2% | -20.3% |
| | William Woods University | 2,264 | 2,054 | 1,830 | 1,891 | 2,042 | 2,172 | 6.4% | 18.7% | -4.1% |
| | Central Methodist University - CLAS | 1,176 | 1,172 | 1,173 | 1,107 | 1,185 | 1,094 | -7.7% | -6.7% | -7.0% |
| Two-Year Public Institutions | State Technical College of Missouri | 1,176 | 1,168 | 1,212 | 1,294 | 1,259 | 1,274 | 1.2% | 5.1% | 8.3% |
| | Moberly Area Community College | 5,440 | 5,661 | 5,294 | 5,793 | 5,444 | 4,823 | -11.4% | -8.9% | -11.3% |
| | State Fair Community College | 4,823 | 5,073 | 5,115 | 5,185 | 4,981 | 4,926 | -1.1% | -3.7% | 2.1% |

*Source: Missouri Department of Higher Education*

## State Government

The State of Missouri is the single largest employer in the Mid-Missouri region, and the state dominates the Jefferson City and Cole County economy. The state also draws thousands of employees from neighboring counties inside and outside of the Mid-MO RPC region. Boone, Callaway and Moniteau counties are the Mid-MO RPC counties that have the most state employees outside of Cole. Private sector employment in Jefferson City and Cole County is also influenced by the State of Missouri. Several private companies in area have business models that are heavily reliant on state contracts.

Economies that are heavily reliant on the government sector tend to be relatively stable and weather economic downturns relatively well; however, while state government may help prevent the region from being as susceptible to large economic shocks, state employment practices have also not contributed to any kind of economic boost for the region in recent years. The State of Missouri has reduced its workforce by more than 5,000 jobs since 2005 -- although not all of these job losses occurred in Mid-Missouri and much of the job loss is due to attrition instead of layoffs. State of Missouri employees are also the lowest paid state employees in the country.

## Other Key Industries and Sectors

While higher education and state government are the two largest employers in the region, Mid-Missouri has a diversified economy with several other key industries and sectors having a major impact on the regional economy. Healthcare, manufacturing, book wholesalers, finance and insurance, food processing and gaming are all industries that are vital to the regional economy and the individual communities where they have a presence.

The healthcare sector is the third largest employer in the Mid-Missouri region. Six different healthcare facilities in Mid-Missouri employ more than 1,000 people each for a total of more than 11,000 employees.

Mid-Missouri has a strong manufacturing base with companies like ABB, Hubbell Power Systems, 3M and Unilever all having manufacturing facilities in the region.

Nuclear energy production is another cornerstone of the Mid-Missouri economy with the Callaway Energy Center employing more than 750 employees. Nuclear energy production has also been a major focus of economic development efforts in recent years as proposals to build a second nuclear power plant in Callaway County and developing the capacity to manufacture small modular reactors (SMRs) in Callaway County have been proposed but never fully materialized.

Book wholesalers also are important employers in the region with Scholastics in Jefferson City and MBS Textbook Exchange in Columbia both being top regional employers.

The finance and insurance is an important and growing sector in the region with companies like Shelter Insurance, Veterans United Home Loans and Missouri Employers Mutual Insurance in Columbia and Central Bancompany and Farm Bureau in Jefferson City all calling Mid-Missouri home.

The food processing industry in the region is also strong with Kraft Foods (Oscar Meyer) facility in Columbia and Burgers' Smokehouse in Moniteau County.

The gaming industry is particularly important for the City of Boonville, where the Isle of Capri Hotel and Casino is located. The casino brings in thousands of visitors each year, is the city's largest employer and is a major source of tax revenue.

## List of Major Employers

**Figure 2.11 Major Employers in Mid-Missouri (Non-Retail)**

| County | Business | # Employee Range |
|---|---|---|
| Cole | State of Missouri | 10,000-15,000 |
| Boone | University of Missouri-Columbia* | 5000-10000 |
| Boone | University Hospital and Clinics | 2,500-5,000 |
| Boone | Boone Hospital Center | 1,000-2,500 |
| Boone | City of Columbia | 1,000-2,500 |
| Boone | Columbia Public Schools | 1,000-2,500 |
| Boone | Harry S Truman Veteran's Hospital | 1,000-2,500 |
| Boone | Shelter Insurance Companies | 1,000-2,500 |
| Boone | Veteran United Home Loans | 1,000-2,500 |
| Callaway | Fulton State Hospital | 1,000-2,500 |
| Cole | Capital Region Medical Center | 1,000-2,500 |
| Cole | Jefferson City Public Schools | 1,000-2,500 |
| Cole | Scholastic, Inc. | 1,000-2,500 |
| Cole | SSM-Health - St. Mary's Hospital | 1,000-2,500 |
| Boone | Columbia College | 750-1,000 |
| Boone | MBS Textbook Exchange | 750-1,000 |
| Boone | State Farm Insurance | 750-1,000 |
| Callaway | Ameren MO Callaway County Energy Center | 750-1,000 |
| Cole | Central Bancompany | 750-1,000 |
| Boone | Hubbell Power Systems | 500-750 |
| Boone | Joe Machens Dealerships | 500-750 |
| Boone | Kraft Foods Columbia | 500-750 |
| Boone | State of Missouri (Excludes MU) | 500-750 |
| Callaway | ABB Power T&D Company | 500-750 |
| Callaway | Dollar General Distribution Center | 500-750 |
| Cole | Jefferson City Medical Group | 500-750 |
| Cole | City of Jefferson | 500-750 |
| Cooper | Isle of Capri Casino & Hotel | 500-750 |
| Boone | 3M | 250-500 |
| Boone | ABC Laboratories | 250-500 |
| Boone | Boone County Government | 250-500 |
| Boone | Boone County National Bank | 250-500 |
| Boone | CenturyLink | 250-500 |
| Boone | IBM** | 250-500 |
| Boone | MidwayUSA | 250-500 |
| Boone | Missouri Employers Mutual Insurance | 250-500 |
| Boone | US Postal Service | 250-500 |
| Callaway | Fulton Public School District | 250-500 |
| Callaway | Fulton Reception & Diagnostic Center | 250-500 |
| Cole | CenturyLink | 250-500 |
| Cole | County of Cole | 250-500 |
| Cole | Lincoln University | 250-500 |
| Cole | Missouri Farm Bureau | 250-500 |
| Cole | Unilever Home & Personal Care | 250-500 |
| Cole | WIPRO Infocrossing | 250-500 |
| Cooper | Boonville Correctional Center | 250-500 |
| Moniteau | Burgers' Smokehouse | 250-500 |
| Moniteau | Cargill | 250-500 |
| Moniteau | Tipton Correctional Center | 250-500 |

** Includes MU, Extension and System Employees*

*** Reported to State of Missouri 4/15*

*Sources: REDI, Jefferson City Area Chamber of Commerce; Callaway Chamber of Commerce, Missouri Department of Economic Development*

# Cluster Analysis

## Defining Clusters

In general, scholars (Blakely & Leigh, 2010) identify clusters as firms in related industries that have the following characteristics:

- are geographically concentrated in a particular region,
- gain a competitive advantage because of their proximity to each other in the region,
- share specialized supplier and buyer (marketing) advantages because of their location, and
- are supported by advantageous infrastructure in the region such as physical resources (e.g., a port or access to materials), educational and research advantages (e.g., universities), financial institutions (e.g., venture capital), or labor advantages (e.g., training programs).

There is no agreed-upon methodology or formula for identifying clusters. There are several quantitative methods researchers use to identify potential clusters, and some economic development practitioners favor identifying local clusters based on consensus of business and community leaders. For the purposes of this Comprehensive Economic Development Strategy (CEDS), Mid-MO RPC staff adopted a three-step approach to identify key industries in the region and to identify existing and potential economic clusters:

1) An analysis of industry competitiveness and concentration was conducted at the two-digit NAICS code level in order to give a big picture view of key industries in the region.
2) Staff looked at the clusters that the State of Missouri identified as key targets during their most recent economic development planning efforts. During that planning effort the state defined clusters via a four-digit NAICS code analysis. Mid-MO RPC staff conducted a similar four-digit NAICS code analysis but at the county level instead of looking at state data.
3) RPC staff looked at the EDA Cluster Mapping Tool to help identify additional clusters.
4) Economic development and community leaders were consulted in order to identify clusters that the data may have missed.

## Two-digit NAICS Code Analysis

The first step of a quantitative approach to cluster identification involves looking at both the concentration of industries within a given region as well as the competitiveness of these industries when compared to the nation as a whole.

Concentration is determined by calculating a location quotient (LQ) for each industry, which calculated by looking at employment within an industry in a region and compares it to employment within an industry in the nation as a whole. LQ is calculated using the following formula: ((# of industry employees locally / total # of local employees in all industries) / (#of industry employees nationally / total # of employees nationally in all industries)). An **LQ greater than 1** means that there is a high concentration of industry employees in a given region when compared to the nation as a whole and an LQ over 1.25 is a very high concentration.

Competitiveness is gauged by looking at job growth rate in a particular industry. If the regional job growth rate in an industry is greater than the national job growth rate in that same industry, we consider the regional industry to be nationally competitive.

Figure 2.12 depicts the industry concentration and competitiveness analysis. Typically non-base industries, like construction, are taken out during this analysis, but they have been included in this analysis in order to get a more full view of the Mid-Missouri economy. Simply note that non-base industries cannot be considered potential clusters.

- **Growing Base Industries**. Industries that are competitive and highly concentrated (high LQ). These industries are the most likely to be classified as clusters.
- **Emerging Industries.** Industries that are competitive but not highly concentrated (low LQ). As these industries continue to grow, they may reach concentration levels that allow them to be considered growing base industries.
- **Transforming Industries.** Industries are non-competitive but highly concentrated. The high concentration of these industries tell us that they are important to the region, but the fact that their growth rate is slower than the national average may be a warning sign that these industries may in the future not be the dynamic employers that they have been in the past.
- **Declining Industries**. Industries with a low concentration (LQ less than 1.0) and that are non-competitive.

**Figure 2.12 Industry Concentration and Competitiveness Analysis**

| | Non-Competitive Industries (Negative Differential Shift) | Competitive Industries (Positive Differential Shift) |
|---|---|---|
| Location Quotient Greater than 1.0<br>*indicates greater than 1.25 | Transforming Industries | Growing Base Industries |
| Location Quotient less than 1.0<br>*indicates less than 0.75 | Declining Industries | Emerging Industries |

Figures 2.13-2.19 show the results of the two-digit NAICS code analysis for the Mid-Missouri Region as a whole and each individual county within the region.

**Figure 2.13 Mid-Missouri – Industry Concentration and Competitiveness**

| | Non-Competitive (Negative Differential Shift) | Competitive (Positive Differential Shift) |
|---|---|---|
| Concentrated Industries<br>*indicates concentrated | • Agriculture*<br>• State government*<br>• Retail Trade<br>• *Management of companies and enterprises* | |
| Non-concentrated Industries<br>*indicates least concentrated | • Manufacturing<br>• Other services, except Public Administration<br>• Military | • Construction<br>• Information<br>• Finance and insurance<br>• Real estate and rental and leasing<br>• Professional, scientific and technical services<br>• Federal, civilian<br>• Local government |

**Figure 2.14 Boone County – Industry Concentration and Competitiveness**

| | Non-Competitive (Negative Differential Shift) | Competitive (Positive Differential Shift) |
|---|---|---|
| **Concentrated Industries *indicates most concentrated** | | • Retail trade<br>• Management of companies and enterprises<br>• Accommodation and food services<br>• Federal Civilian<br>• State government |
| **Non-concentrated Industries *indicates least concentrated** | • Agriculture<br>• Mining<br>• Military | • Forestry, fishing, and related activities<br>• Construction<br>• Manufacturing<br>• Wholesale trade<br>• Information<br>• Finance and insurance<br>• Real estate and rental and leasing<br>• Professional, scientific, and technical services<br>• Administrative and waste management services<br>• Education services<br>• Health care and social assistance<br>• Arts, entertainment and recreation<br>• Other services, except public administration<br>• Local government |

**Figure 2.15 Callaway County – Industry Concentration and Competitiveness**

| | Non-Competitive (Negative Differential Shift) | Competitive (Positive Differential Shift) |
|---|---|---|
| **Concentrated Industries *indicates most concentrated** | • Agriculture<br>• Manufacturing<br>• Transportation and warehousing<br>• Other services, except public administration<br>• State Government | |
| **Non-concentrated Industries *indicates least concentrated** | • Mining<br>• Information<br>• Finance and insurance<br>• Real estate and rental and leasing<br>• Arts, entertainment and recreation<br>• Accommodation and food services<br>• Federal, civilian<br>• Military<br>• Local Government | • Construction<br>• Retail trade<br>• Professional, scientific and technical services<br>• Management of companies and enterprises<br>• Administrative and waste management services |

**Figure 2.16 Cole County – Industry Concentration and Competitiveness**

| | Non-Competitive (Negative Differential Shift) | Competitive (Positive Differential Shift) |
|---|---|---|
| **Concentrated Industries *indicates most concentrated** | • Agriculture<br>• Utilities<br>• Retail trade<br>• Mgt of companies and enterprises<br>• State government | |
| **Non-concentrated Industries *indicates least concentrated** | • Construction<br>• Transportation and warehousing<br>• Administrative and waste management services<br>• Education services<br>• Health care and social assistance<br>• Accommodation and food services<br>• Federal, civilian<br>• Military | • Wholesale trade<br>• Information<br>• Finance and insurance<br>• Real estate and rental and leasing<br>• Professional, scientific and technical services<br>• Arts, entertainment and recreation<br>• Other services, except public administration<br>• Local government |

**Figure 2.17 Cooper County – Industry Concentration and Competitiveness**

| | Non-Competitive (Negative Differential Shift) | Competitive (Positive Differential Shift) |
|---|---|---|
| **Concentrated Industries *indicates most concentrated** | • Agriculture<br>• Manufacturing<br>• Retail trade<br>• Other services, except public administration<br>• State government<br>• Local government | • Construction |
| **Non-concentrated Industries *indicates least concentrated** | • Real estate and rental and leasing<br>• Professional, scientific and technical services<br>• Federal, civilian<br>• Military | • Information<br>• Finance and insurance |

**Figure 2.18 Howard County – Industry Concentration and Competitiveness**

| | Non-Competitive (Negative Differential Shift) | Competitive (Positive Differential Shift) |
|---|---|---|
| **Concentrated Industries *indicates most concentrated** | • Agriculture | • Local government |
| **Non-concentrated Industries *indicates least concentrated** | • Construction<br>• Wholesale trade<br>• Professional, scientific and technical services<br>• Federal, civilian<br>• Military<br>• State government | • Manufacturing<br>• Retail trade<br>• Information<br>• Administrative and waste management services<br>• Other services, except public administration |

**Figure 2.19 Moniteau County – Industry Concentration and Competitiveness**

| | Non-Competitive (Negative Differential Shift) | Competitive (Positive Differential Shift) |
|---|---|---|
| **Concentrated Industries *indicates most concentrated** | • Agriculture<br>• Manufacturing<br>• Retail trade | • Construction<br>• State government<br>• Local government |
| **Non-concentrated Industries *indicates least concentrated** | • Real estate and rental and leasing<br>• Professional, scientific and technical services<br>• Arts, entertainment and recreation<br>• Accommodation and food services<br>• Other services, except public administration<br>• Federal, civilian<br>• Military | • Wholesale trade<br>• Information<br>• Finance and insurance |

## State Target Clusters (Four-digit NAICS Code Clusters)

Through an extensive planning effort, the State of Missouri has identified seven target clusters as the focus of its economic development efforts. Part of this planning effort included a cluster analysis which used a 4-digit NAICS code analysis. The seven target clusters of the State of Missouri are as follows:

- Advanced Manufacturing
- Energy Solutions
- Biosciences
- Health Science and Services
- Information Technology
- Financial and Professional Services
- Transportation and Logistics

## State Target Cluster Strengths within Mid-MO Region

In an effort to keep the Mid-Missouri regional economic development strategy consistent with the State of Missouri's statewide economic development strategy, RPC staff conducted the same 4-digit NAICS code cluster analysis for each of the six Mid-MO RPC counties that the state used for its statewide plan. The benefit of this approach is that it ties the Mid-MO RPC CEDS directly to the state economic development strategy that is already in place and being implement. As with the two-digit NAICS code analysis, the 4-digit cluster analysis is based on industry concentration and competitiveness.

Figure 2.20 depicts the strongest industries that were discovered in the four-digit NAICS code analysis. Industries within the state's bioscience, financial solutions, health science and services, and information technology cluster all stood out as strong performers.

**Figure 2.20 State Target Cluster Strengths within Mid-MO Region**

| Target Cluster | Industry | County / Region | Location Quotient (LQ) | Job Growth Rate (2009 to 2013) | Local > National Growth Rate |
|---|---|---|---|---|---|
| Advanced Manufacturing | Plastics Product Manufacturing | Cole | 0.94 | Data Not Available | Data Not Available |
| Bioscience | Oilseed and Grain Farming | Callaway and Cooper | 9.23, 12.02 | 132%, 26% | Yes, No |
| Bioscience | Hog and Pig Farming | Callaway | 18.81 | 25% | Yes |
| Bioscience | Medical and Diagnostic Labs | Boone | 2.80 | 2% | No |
| Financial Solutions | Insurance Agencies, Brokerages, and Related Services | Boone | 2.44 | 331% | Yes |
| Financial Solutions | Depository Credit Intermediation | Cole and Howard | 1.35, 3.02 | 11%, 2% | Yes |
| Health Science and Services | Nursing Care Facilities | Mid-MO Region | 1.14 | 9% | Yes |
| Health Science and Services | Residential Mental Health Facilities | Boone | 1.21 | 3% | No |
| Health Science and Services | Community Care Facilities for the Elderly | Boone and Howard | 1.23, 6.60 | 45%, -2% | Yes, No |
| Information Technology | Data Processing and Related Services | Cole | 2.73 | 152% | Yes |
| Information Technology | Computer Systems Design and Related Services | Boone and Cole | 1.11, 1.16 | 150%, 66% | Yes, Yes |

Key Findings of Mid-MO Cluster Analysis include:

- Strength within the Bioscience cluster has been identified as expected. The University of Missouri is a national leader in bioscience education and research. This cluster has been a key target for the region in recent years and will continue to be a target in the future.
- Growth within the Insurance Agencies, Brokerages, and Related Services industry is phenomenal, with over 300% growth rate between 2009 and 2013.
- Plastics Product Manufacturing in Cole County is shown as having an LQ just under 1 (0.94), since these 2013 numbers were released, an additional 150 new employees were added within this industry when Continental Commercial Products (CCP) decided to locate in Jefferson City in 2015. This should push their current the LQ well over 1 and help contribute to a high growth rate once these new employees are added to the official data.
- While Boone County might have more high profile technology companies, Cole County also has a strong information technology industry. The Jefferson City Area Chamber of Commerce confirms that the Jefferson City/Cole County IT industry strength is due to IT businesses that have developed in order to provide support to the State of Missouri.

## EDA Cluster Mapping Project Identified Clusters

The U.S. Cluster Mapping Project is a national economic initiative that provides over 50 million open data records on industry clusters and regional business environments in the United States to promote economic growth and national competitiveness. The project is led by Harvard Business School's Institute for Strategy and Competitiveness in partnership with the U.S. Department of Commerce and U.S. Economic Development Administration.

The EDA Cluster Mapping Project identifies what it calls the Columbia, MO region as a fifteen county region that includes all six Mid-MO RPC counties. The cluster mapping project identifies the Columbia, MO region's top employment cluster as the Distribution and E-Commerce cluster. Employment for this cluster was 10,877 individuals in 2013. Figure X shows a breakdown of the various subclusters that comprise this cluster. Wholesale of Books, Periodicals, and Newspapers is the largest identified subcluster with more 1,750 jobs in Cole County and 750 jobs in Boone County. The Columbia, MO region ranks 4th nationally in wholesale of books, periodicals, and newspapers.

**Figure 2.21 Top EDA Mapping Project Identified Clusters**

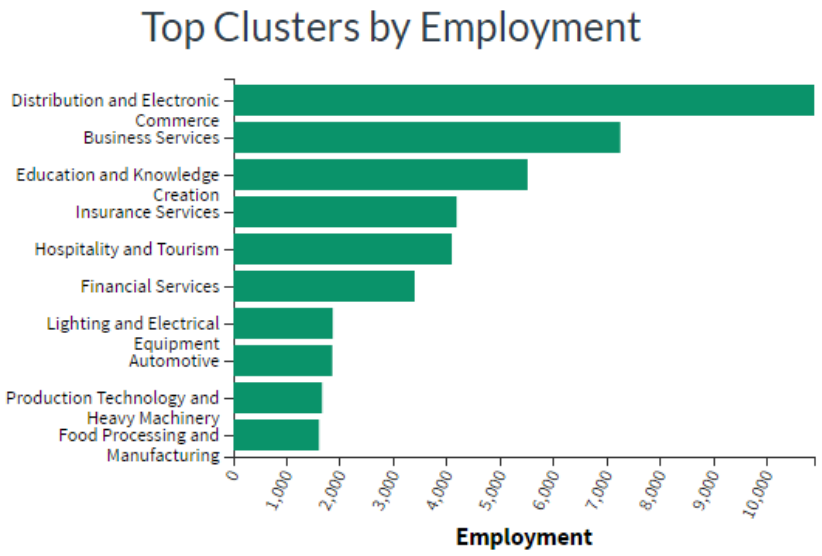
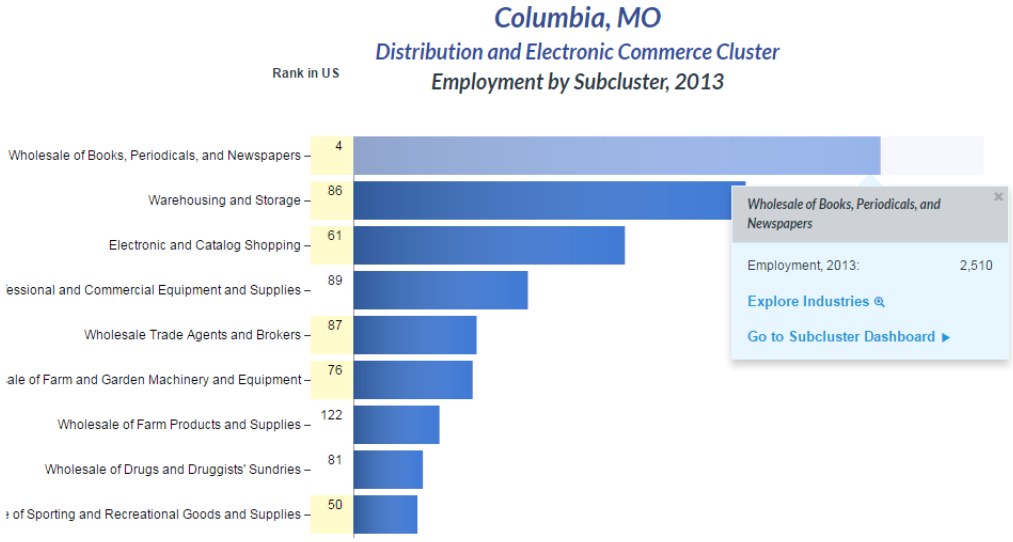



**Figure 2.22 Top Distribution and E-Commerce Subclusters**



## Expert Identified Clusters

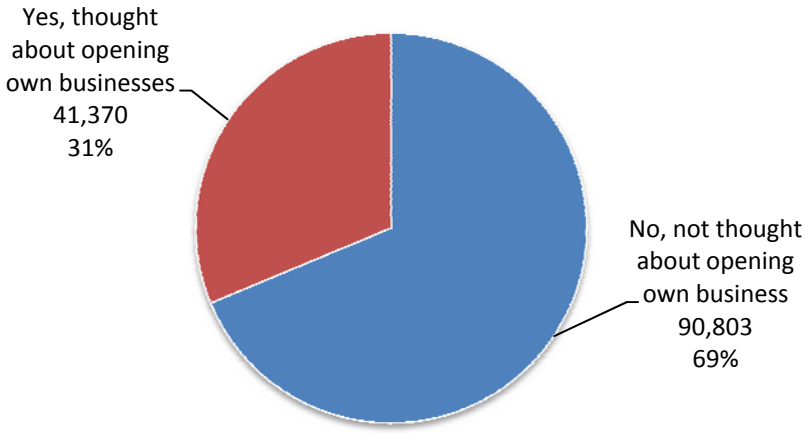
The University of Missouri Research Reactor (MURR) is the key piece of infrastructure which is at the center of a new cluster developing in Columbia. MURR is the largest university nuclear research reactor in the country. In 2014, radioisotope producer Northwest Medical Isotopes (NWMI) announced plans to located in Columbia, MO, at the University of Missouri's Discover Ridge Research Park. EDA funding is being used to help develop infrastructure within the research park that will allow NWMI to locate there. MURR is the key reason NWMI chose to locate in Columbia. Several other companies have also expressed an interest in utilizing material from MURR in the way that NWMI plans to do. This sets up Mid-Missouri has a potential destination point for companies with this infrastructure need.

The Mid-Missouri Region lies on the eastern edge of the KC Animal Health Corridor, which ranges from Manhattan, KS to Columbia, MO. Within this region is found 56% of the worldwide animal health, diagnostics and pet food sales. The University of Missouri life science and veterinary programs are key contributors to this cluster. Fayette, MO, located in Howard County, is also a part of the KC Animal Health Corridor. It is home to two labs that specialize in veterinary medicine.

## Entrepreneurship

The number of potential entrepreneurs in the Mid-Missouri Region has been identified by The Docking Institute in their Columbia Missouri Labor Basin Labor Availability Analysis. This study identifies the size of the labor pool in Mid-Missouri as 137,968 people. 132,173 (96%) of these people do not currently own their own business. However, of those that do not currently own their own business, 31% have seriously considered this option for new employment. This 31% represents 41,370 potential entrepreneurs.

**Figure 2.23 Potential Entrepreneurs**




*Source: Columbia Missouri Labor Basin Labor Availability Analysis - 2015, The Docking Institute of Public Affairs*

The Docking Institute study finds that 40.6% of the available labor force has a Bachelors or Masters Degree, but only 32.6% of potential entrepreneurs have a Bachelors or Masters Degree. Alternatively, 30.3% of the available labor pool have some college or an Associate's Degree, but 41.2% of potential entrepreneurs have some college or an Associate's Degree.

**Figure 2.24 Highest Level of Education Achieved Among Potential Entrepreneurs**

| Educational Attainment | Number | Percent |
|---|---|---|
| Doctoral Degree | 1454 | 3.5 |
| Masters Degree | 3002 | 7.3 |
| Bachelors Degree | 10453 | 25.3 |
| Associates Degree | 7635 | 18.5 |
| Some College | 9380 | 22.7 |
| High School Diploma Only | 8399 | 20.3 |
| Less HS Diploma | 1047 | 2.5 |

*Source: Columbia Missouri Labor Basin Labor Availability Analysis - 2015, The Docking Institute of Public Affairs*

## Retail Sales

Consumer spending accounts for two-thirds of the U.S. economy and likewise, is essential to Missouri's economy. Retail sales account for around one-half of consumer spending nationwide. Although no specific retail sales data are readily available for Missouri, total taxable sales as measured by the Missouri Department of Revenue (DOR) can serve as a proxy measure. Retail sales account for approximately 65 percent of taxable sales in Missouri, with an additional 10 percent from wholesale trade, 10 percent from service industries such as hotels and amusement parks, 10 percent from communications industries, and 5 percent from other industries. According to the Missouri Economic Research and Information Center (MERIC), Missouri taxable sales for the 1st quarter of 2015 are estimated at approximately $1.9 billion. This is an increase of 1.62% in actual dollars from the same quarter of 2014.

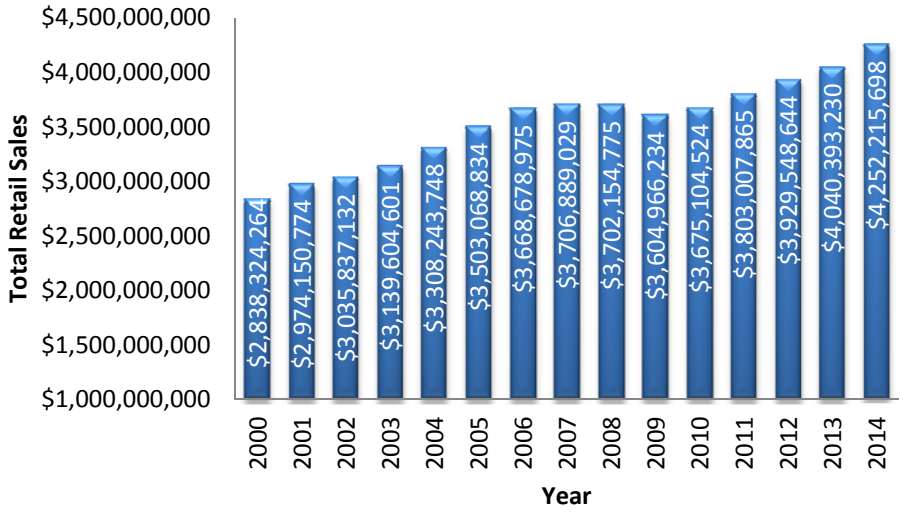
Figure 2.25 shows total taxable sales for the Mid-Missouri region, each county in the region, and the largest city in each county.

**Figure 2.25 Total Taxable Sales**

| County | Total Taxable Sales | City | Total Taxable Sales | Region | Total Taxable Sales |
|---|---|---|---|---|---|
| Boone | 2,559,443,841.00 | Columbia | 2,277,218,896.35 | Mid-MO Region | 4,252,215,697.66 |
| Callaway | 295,439,590.74 | Fulton | 150,888,563.60 | | |
| Cole | 1,084,739,280.39 | Jefferson City | 995,801,801.44 | | |
| Cooper | 157,598,914.58 | Boonville | 125,239,574.78 | | |
| Howard | 49,581,023.80 | Fayette | 20,700,303.68 | | |
| Moniteau | 105,413,047.15 | California | 48,563,881.79 | | |

*Source: Missouri Department of Revenue, 2014*

**Figure 2.26 Total Retail Sales for Mid-MO Region, 2000-2014**




*Source: Missouri Department of Revenue, 2014*

## Economic Resilience

Economic resilience is the ability of a region to withstand and recover from economic shocks such as natural disasters, downturns in an industry that a region is reliant upon, the closure of a major employer or any other national or global market shift. Resilient local and regional economies are those that adapt to changing conditions.

The National Academy of Sciences has highlighted that there is not currently an agreed upon way of measuring resilience. This makes it hard to identify priorities, measure progress and articulate the benefits of long term investments in resilience.

There are, however, efforts to establish a reliant measure of resilience. The University of Missouri Institute of Public Policy (IPP) has been developing indexes of vulnerability and resilience in each of the four categories -- social, economic, infrastructure, and environmental resilience (Dabson, et al. 2016).

Every county can be classified as being in one of four quadrants as shown in Figure 2.27. Counties in the red quadrant with high vulnerability and low resilience may be candidates for priority attention.

**Figure 2.27 Resilience-Vulnerability Quadrants**

**Figure 2.28 Mid-MO Economic Resilience & Vulnerability**

IPP has conducted a preliminary analysis of economic resilience and vulnerability for each county in Missouri. The results for the Mid-Missouri region are shown in Figure 2.28

The IPP preliminary analysis shows that four Mid-Missouri counties are in are very strong position from an economic vulnerability and resilience standpoint. Boone, Callaway, Cole and Howard counties are all considered to have a low vulnerability to economic shocks, and also highly resilient to these events. Cooper and Moniteau counties have been classified as having low resilience but also have low vulnerability to economic shocks. This analysis suggests that future regional economic resilience planning efforts should pay particular attention to Cooper and Moniteau counties.

Figures 2.29-2.31 show the IPP preliminary analysis of regional resilience and vulnerability regarding social, infrastructure and environmental factors. This analysis suggests that future resilience planning efforts should place an emphasis on environmental resilience due to the number of high vulnerability/low resilience counties.

**FIgure 2.29 Mid-MO Social Resilience and Vulnerability**

**Figure 2.30 Mid-MO Infrastructure Resilience & Vulnerability**

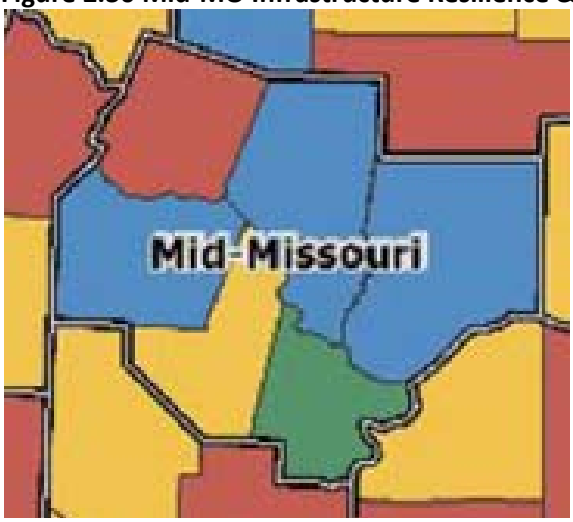



**Figure 2.31 Mid-MO Environmental Resilience & Vulnerability**

# C. Infrastructure

## Broadband

Mid-Missouri has a world-class broadband network. Over the last three years, three separate fiber-to-the-home projects have been completed or are near completion in Mid-Missouri. As a result of these projects, five of the six counties in the Mid-MO RPC region have gigabit Internet service available to residents in at least part of the county. These fiber-to-the-home were built by Co-Mo Electric Cooperative, Socket Telecom, and CenturyLink. The Co-Mo Electric and Socket Telecom projects are unique because they serve rural areas. The majority of major metropolitan areas still do not have gigabit service, so to have rural areas covered with this infrastructure is an important opportunity for companies need state of the art fiber technology but can also benefit from greenfield land with few restrictions on land development.

Co-MO Electric Cooperative is in the final stage of building its gigabit fiber network. When the network is completed in 2016 Co-Mo Electric Cooperative will be the first rural electric cooperative in the nation to serve its entire service territory with fiber to the home gigabit Internet service. Moniteau and Cooper counties are both part of the Co-Mo Electric service territory.

Socket Telecom was chosen by the USDA Rural Development's Rural Utilities Service program to build a fiber-to-the-home network to more than 3,000 homes and businesses across rural parts of Callaway and Boone counties. Socket recently increased its maximum download speed from 300 mbps to 1 gbps.

In 2014, CenturyLink announced that it would for the first time start providing gigabit Internet service to a select 16 cities nationwide. Columbia and Jefferson City were each selected as part this project, and are currently served by the CenturyLink gigabit Internet service.

Despite these important infrastructure projects, there are still portions of rural Boone, Callaway and Cole counties that struggle with high speed Internet access. Howard County, in particular, has serious challenges with high speed Internet access.

# Transportation

## Highways

Mid-Missouri is a crossroads for several of the state's major highway systems. Interstate 70 along with US Highways 63, 54, and 50 all converge in the Mid-MO RPC region. The cities of Columbia and Jefferson City are major transportation hubs at both the regional and state level. I-70 runs through Callaway, Boone, and Cooper Counties as well as the City of Columbia, connecting the metropolitan areas of Kansas City and St. Louis. These Interstate and US highways are part of a much larger and complex state and national system moving people, freight, and services from east to west and north to south across the nation. These roadways are critical to the economic vitality of the region. According to data provided by MoDOT, there are 13,449 miles of publicly maintained roadway in the Mid-MO RPC region. Those publicly maintained roads consist of a large network of county roads and city streets that interconnect with the larger, state maintained system.

Traffic congestion in urban areas is typically confined to the morning and evening peak hours of travel. Delays from congestion occur at specific locations such as interstate ramps, signalized intersections and bridges.

Congestion in rural areas can occur at any time when the roadway is unable to handle the traffic flow. This can be related to peak hours of travel, including work and holiday travel. It can also be because the typical two-lane roadway is restricted and traffic is unable to flow freely, often because of accidents or slow moving vehicles.

MoDOT's Traffic Data Acquisition System (TRADAS) collects and processes all traffic data uniformly. The traffic data collected includes such items as traffic volumes (both automobile traffic and truck traffic), level of service (congestion condition) and vehicle classifications. This data is used to understand traffic patterns and identify locations of need.

Figure 3.0 depicts total vehicle volume in the Mid-MO RPC region. The most heavily traffic volume in Mid-Missouri is along I-70, U.S. 63 and stretches of U.S. 54 and U.S. 50 leading into and through Jefferson City.

Figure 3.1 depicts total truck volume in the Mid-MO RPC region, and Figure 3.2 depicts the projected truck density growth in Missouri between 2011 and 2030. I-70 has the highest level of truck volume in the region, and truck density along I-70 is expected to increase by 10 to 25 million tons of freight per year from by 2030.

**Figure 3.0 Total Vehicle Volume - AADT (Annual Average Daily Traffic)**

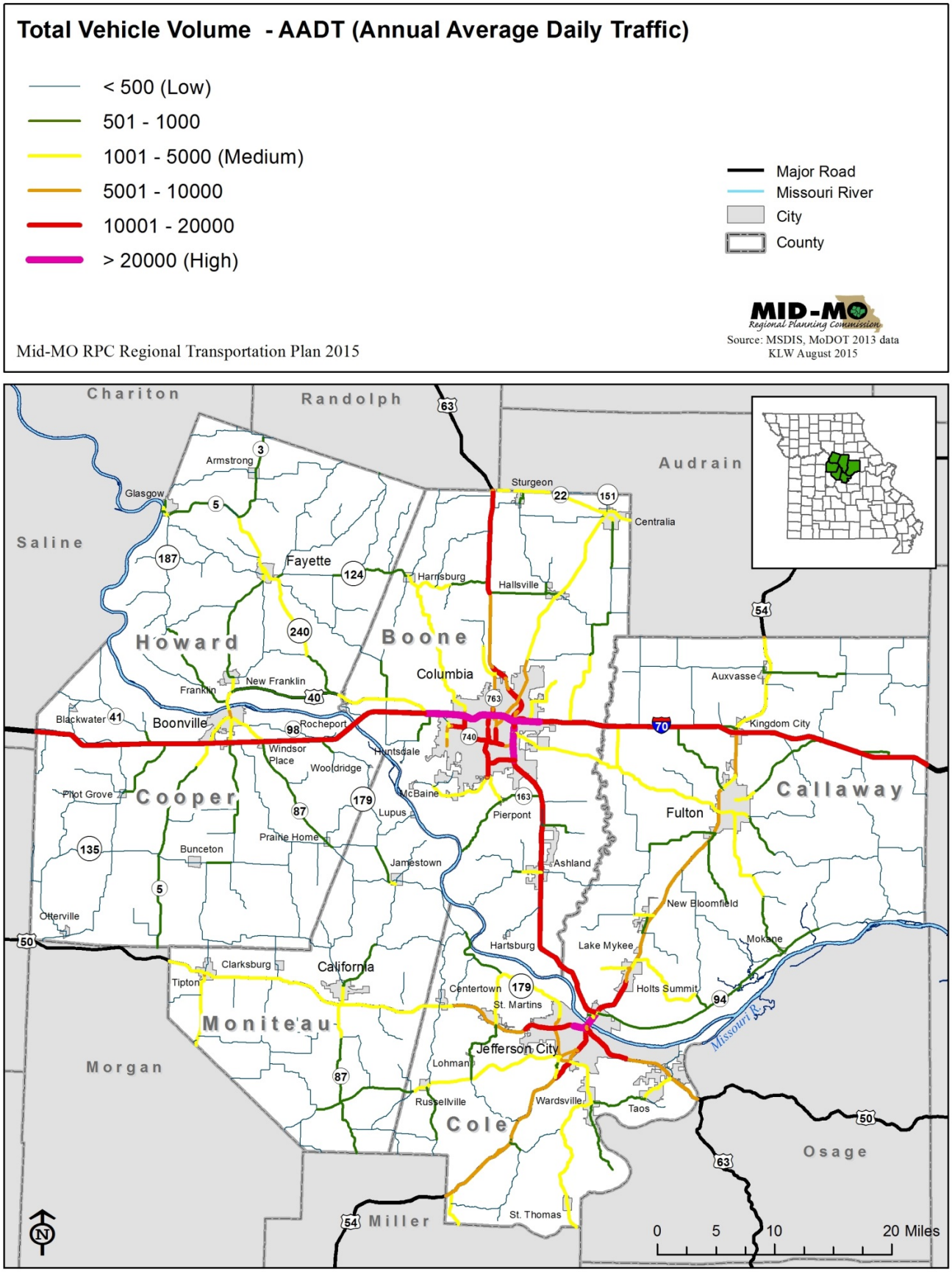


**Figure 3.1 Total Truck Volume - AADT (Annual Average Daily Traffic)**

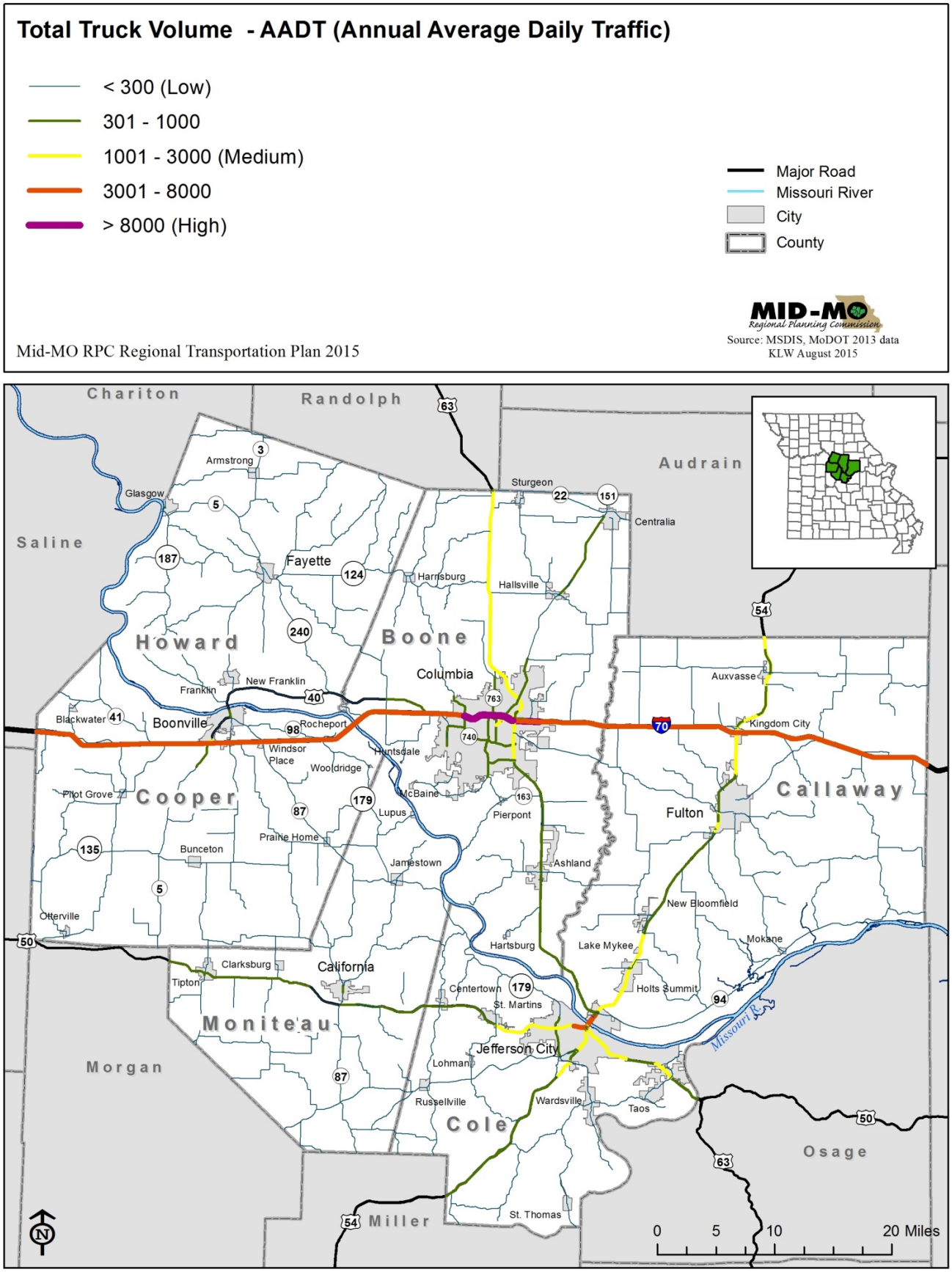
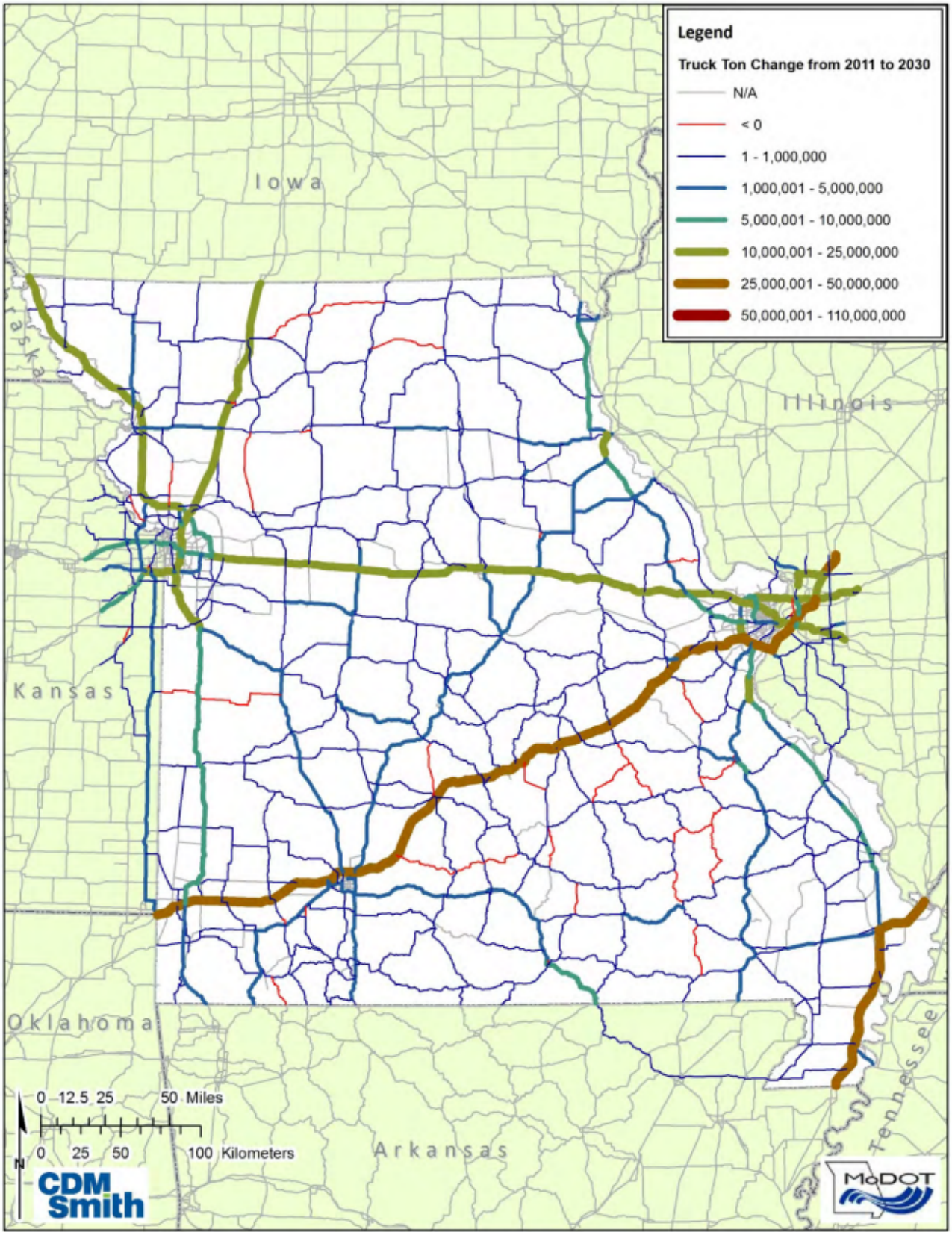


**Figure 3.2 Missouri Truck Density Growth Projection, 2011-2030**




*Source: CDM Smith, Missouri State Freight Plan (2014), Appendix A*

## Rail

There are five railroad companies operating on 373 miles of track in the Mid-MO RPC region. These railroad companies consist of three Class I railroads, one terminal railroad, and one out of service local railroad. Figure 3.3 depicts the railroad operators, their classification, and miles of track within Mid-Missouri and the state.

**Figure 3.3 Mid-MO RPC Railroad Operators**

| Operator | Category | Mid-MO Miles | Missouri Miles |
|---|---|---|---|
| Columbia Terminal (COLT) | Terminal | 43 | NA |
| Kansas City Southern (KCS) | Class I | 42 | 396 |
| Norfolk Southern Railway Company (NS) | Class I | 116 | 409 |
| Ozark Valley (OVRR) - **inactive** | Local | 33 | 33 |
| Union Pacific (UP) | Class I | 144 | 1,497 |

NA: Not Available

**Class I Railroads** are large line haul freight railroads with a 2009 operating revenue of $378.8 million or more. There are seven Class I Railroads in the United States, and six of them own tracks or have operating rights in Missouri.

**Switching & Terminal Railroads (S&T)** perform pickup and delivery services within a port or industrial area, or move traffic between other railroads. These railroads do not provide point-to-point transportation; rather they provide connecting services to get freight to and from its ultimate origin or destination.

**Local Railroads** are short line haul railroads which generally have annual revenues of less than $40 million per year. Seventy-five percent of the more than 300 local railroads which operate in the U.S. have fewer than 100 miles of railroad line.

**Figure 3.4 Mid-MO RPC Rail Lines**

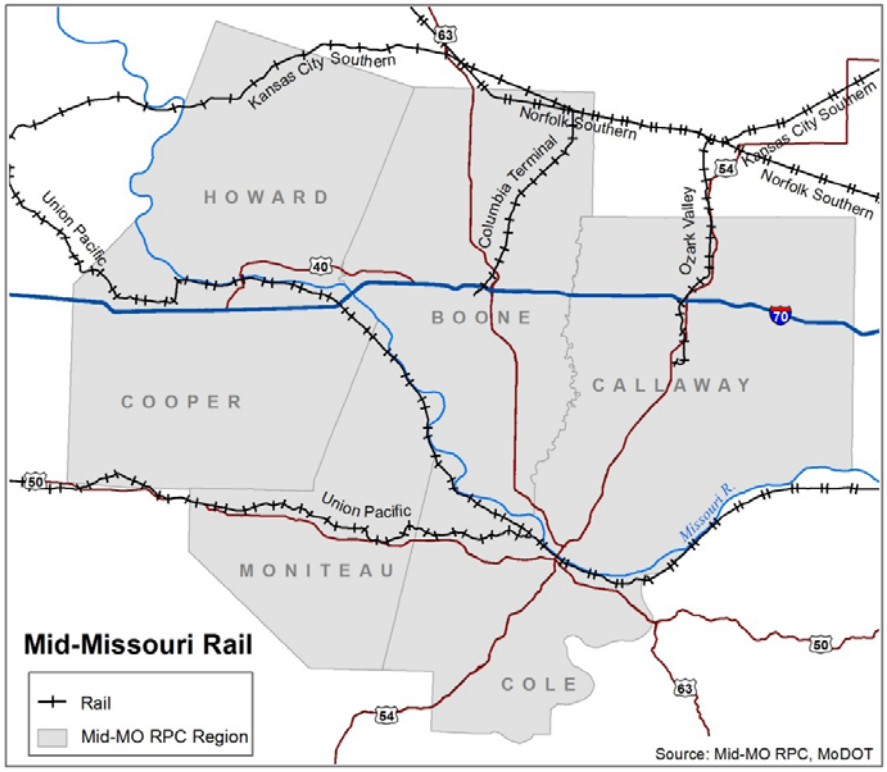



Figure 3.4 illustrates the locations of the rail lines within the Mid-MO RPC region. Union Pacific, Kansas City Southern, Norfolk Southern, and COLT all serve the Mid-Missouri region. Five of Mid-MO RPC's six counties have active rail lines.

Figure 3.5 depicts the rail line operators in Missouri and the freight density traversing these lines in tons. The Union Pacific line running through the Mid-MO RPC region is one of the major rail lines in the state.

**Figure 3.5 Missouri Rail Density, 2011**

*Source: CDM Smith, Missouri State Freight Plan (2014), Appendix A*

## Airports

The Mid-MO RPC region is home to four airports which are located in Columbia, Jefferson City, Fulton, and Boonville. The Columbia Regional Airport, the only commercial airport in the region, provides multiple daily flights to Dallas/Fort-Worth and Chicago O'Hare. All four airports are important parts of the communities they serve. Business, agriculture, medical emergency services and law enforcement all benefit from their presence in the region.

### Columbia Regional Airport (COU)

The Columbia Regional Airport, the only commercial airport in the region, is owned and operated by the City of Columbia. The airport has two runways which are 6,501 and 4,401 feet in length. American Airlines provides daily nonstop flights to Dallas/Fort-Worth and Chicago O'Hare, connecting passengers to the second and fourth busiest international airport hubs in the US.

In addition to commercial passenger service, the airport also accommodates corporate flying, air cargo, flight training, and recreational flying. Corporate users of the airport include the University of Missouri, Cloud Surfers, Highland Dairy, and Menards. Students, faculty, staff, and visitors of the University of Missouri frequently utilize the airport for both commercial and general aviation purposes in addition to chartering flights for collegiate sports teams. The U.S. Postal Service is another prominent tenant that operates out of the Columbia Regional Airport.

For businesses interested in locating near the airport, the Ashland Industrial Park is also located just over a mile from Columbia Regional Airport along Angel Lane. Multiple two and a half acre lots are available for development.

The airport provides support to law enforcement operations, environmental patrols, emergency medical transports, and medical doctor transports. Emergency medical evacuation and transportation flights utilize the airport daily working with the three local hospitals in Columbia.

### Jefferson City Memorial Airport (JEF)

Jefferson City Memorial Airport is located in Missouri's capital, Jefferson City and is owned and operated by the City of Jefferson. The airport has two runways which are 3,401 and 6,001 feet in length. The airfield is shared with the Missouri National Guard headquarters and includes the Special Troops Battalion-Joint Force Headquarters.

Airport activities include corporate flying, flight training, military exercises, air cargo, recreational flying, emergency medical transports, medical doctor transports, and search and rescue training performed by the Civil Air Patrol. Several of Missouri's state government flight departments are based at the airport, including the Missouri Highway Patrol, the Missouri Department of Conservation, and the Missouri Department of Transportation. The airport also serves as a staging area throughout the year for community events and meetings.

### Fulton-Elton Hensley Memorial Airport (FTT)

Elton Hensley Memorial Airport is owned and operated by the City of Fulton. The airport has three runways which are 4001, 3203, and 2488 feet in length. The smallest of the three runways is a turf runway.

Airport services include corporate flying, flight training, and recreational flying. Several companies rely on the airport to transport staff, equipment, and goods in and out of the region. Aerial pipeline inspectors and seasonal aerial agricultural sprayers rely on the airport for aviation-related services. Students, staff, and

visitors to William Woods University and Westminster College located in Fulton, also frequently use the airport. The Missouri National Guard uses the airport's grass strip and other amenities for training personnel.

### Jesse Viertel Memorial Airport (VER)

Jesse Viertel Memorial Airport is located between the Missouri River and I-70 in Boonville and is owned and operated by the City of Boonville. The airport has one asphalt paved runway which is 4,000 feet in length.

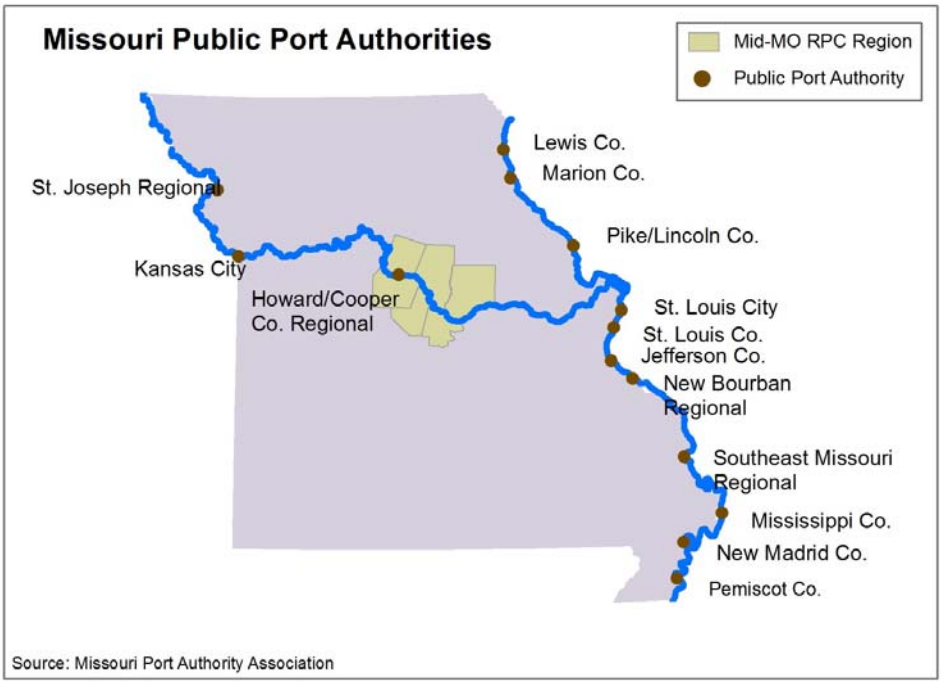
Common activities at the airport include corporate flying, flight training, aerial pipeline inspections, and recreational flying. Seasonally, aerial agricultural spraying, aerial photography, and Civil Air Patrol (CAP) search and rescue training and operations take place at the airport. The Missouri National Guard and Missouri State Highway Patrol utilize the airport to conduct training and daily operations. The airport also supports emergency medical transports, medical doctor transports to Valley Hope Association, and environmental patrols and studies conducted by the Missouri Department of Conservation and U.S. Army Corps of Engineers.

## Ports and Navigable Waterways

The Missouri River runs through the heart of the Mid-MO RPC region and is the only navigable waterway in the region capable of carrying commercial goods and products. While the current commercial use of the river has seen a strong decline over the past 30 years, some industries still use this thoroughfare for products such as sand, rock, grain and other large items that may be difficult to transport via highway or air.

The Howard/Cooper County Regional Port Authority, the only river port in Mid-Missouri, is one of 14 public port authorities in the state. Several commodities are transported on the Missouri River including agricultural products, fertilizers, petroleum products, and manufactured goods such as building materials. These products flow along the Missouri River to the Mississippi River where they join a larger variety of products that work their way towards other major ports.

**Figure 3.6 Missouri Public Port Authorities**

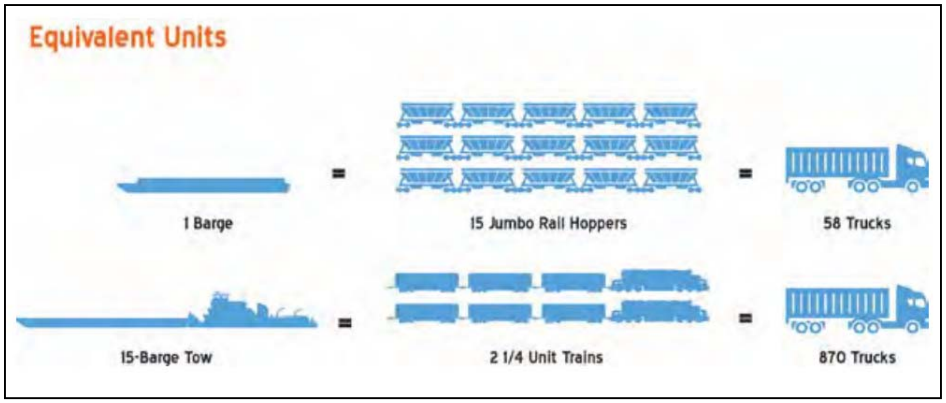



Moving freight on waterways, such as the Missouri River, reduces fuel and labor costs associated with transportation. This means more profits for companies, while simultaneously reducing congestion on public roadways.

### Waterway Capacity

Missouri's waterways are currently uncongested and underutilized. They have the capacity to move substantially more barge traffic than the system is currently utilizing.

**Figure 3.7 Freight Capacity Comparison**




Barges offer greater freight capacity than other freight transportation modes, as shown in Figure 3.7. A standard tow (15 barges) has a capacity of 22,500 tons. It would take approximately 225 railroad cars or 870 semi-trucks to carry the same amount of cargo as a standard tow.

## Mid-MO RPC Ports and Docks

Mid-Missouri's nine private dock facilities are mostly used for the movement of rock and sand, but can be utilized for other products such as grain, heavy equipment, and bulk goods. Figure 3.8 lists the private and public dock facilities along the Missouri River.

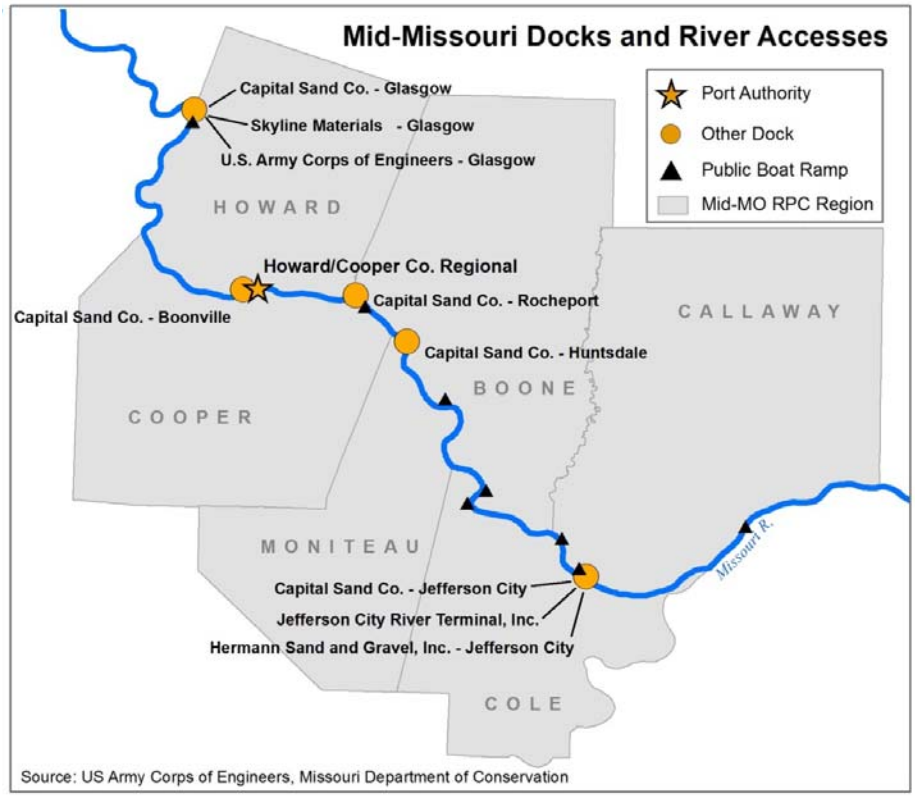
**Figure 3.8 Mid-MO RPC Ports and Docks**

| Facility Name | Location | Facility Use |
|---|---|---|
| Capital Sand Co. | Jefferson City | Sand and gravel unloading |
| Jefferson City River Terminal, Inc. | Jefferson City | Loading and unloading dock |
| Hermann Sand and Gravel, Inc. | Jefferson City | Sand unloading |
| Capital Sand Co. | Huntsdale | Sand and gravel unloading |
| Capital Sand Co. | Rocheport | Sand and gravel unloading |
| Capital Sand Co. | Boonville | Sand and gravel unloading |
| Howard/Cooper Co. Regional Port Authority | Boonville | Loading and unloading |
| Skyline Materials | Glasgow | Rock loading |
| Capital Sand Co. | Glasgow | Sand and gravel unloading |
| U.S. Army Corps of Engineers | Glasgow | Loading platform |

*Source: U.S. Army Corps of Engineers - 2014*

Figure 3.9 depicts the locations of all the Mid-Missouri river ports and public access in Mid-Missouri.

**Figure 3.9 Mid-Missouri Docks and River Accesses**



## Howard/Cooper County Regional Port Authority

The port is located in Howard County on the north side of the Missouri River across from the city of Boonville. The port is adjacent to US 40, MO 5, MO 87, and I-70. Access to Missouri Pacific Railroad is within one mile of the facility. The port facility includes the following:

**Figure 3.10 Howard/Cooper Co. Regional Port Authority**

- Storage capacity of 250,000 bushels of grain and 4 million gallons of liquid chemicals
- Two dry storage buildings and a 15,000-ton outside storage pad also available
- A general cargo dock with liquid capabilities, a 50-ton crane and a 25-ton crane located on a floating dock
- A complete line of support equipment, including loaders, dump trucks, conveyors and repair equipment is also available
- 35 prime industrial acres are available for development
- Available utilities include three-phase and single-phase electric, as well as water and gas

Although it is the only Missouri River public shipping access between Kansas City and St. Louis, current use of the port is minimal. As part of the 2014 update of the Regional Needs List, the Port Authority identified a desire to expand and/or relocate the facility to increase use. Activities associated with this expansion/relocation include the following:

- Dredge and fill adequate site/load and unload conveyors
- New Dock and Road
- 2 - 400,000 Bu Grain Bins
- Dry Fertilizer and NH3 storage
- Crane Capable of handling containers

Additionally, Callaway County identified installation of a new Port Authority as a need in 2014. The exact location of this port has not been identified, but would most likely be located near the Missouri River Bridge across from Jefferson City.

## Freight

Motor carriers, rail, and Missouri River barges all contribute to the movement of several goods, materials, and services in the region. I-70, which crosses three Mid-Missouri counties, extends approximately 2,153, miles from near Baltimore, Maryland to Cove Fort, Utah. I-70 serves ten states including Utah, Colorado, Kansas, Missouri, Illinois, Indiana, Ohio, West Virginia, Pennsylvania, and Maryland. I-70 also connects to 20 other major Interstates.

Within Missouri, I-70 runs approximately 251 miles from the Illinois border in St. Louis to the Kansas border in Kansas City. Rail service includes three national Class I railroad companies: Kansas City Southern Railway (KCS), Norfolk Southern Railway (NS), and Union Pacific Railroad (UP). While the only Port Authority in the Mid-Missouri region is currently inactive, several private companies in Mid-Missouri use the Missouri River to ship raw materials and agricultural products.

According to Missouri's Long Range Transportation Plan, the majority of freight is carried by truck. In 2011, 64% of freight traveled on Missouri's road network. Mid-Missouri's major roadways bring a large volume of motor carriers through the region. While I-70 carries significantly more truck traffic than the supporting US and state highways in the region, those other roadways are critical to the success of the overall system.

According to the Missouri Freight Plan, major freight distributors in the Mid-MO RPC region include:

- Dollar General - Fulton, MO
- MBS - Columbia, MO
- Midway USA - Columbia, MO
- Scholastic - Jefferson City, MO

Additionally, the Columbia Area Transportation Study Organization (CATSO) provides a list of Columbia based freight haulers in their Long Range Plan. This list can be found in Appendix F of this plan.

# II. SWOC Analysis

This section is devoted to an analysis of the strengths, weaknesses, opportunities, and challenges of the Mid-Missouri economy. It draws on the data collected and analyzed in the Regional Overview, Economy, and Infrastructure sections of this plan. Economic development professionals in the Mid-Missouri region were then consulted in order to verify that this data is an accurate representation of the regional economy. These experts were asked to identify strengths, weaknesses, opportunities and challenges that the data missed.

Figure 4.0 lays out the strengths, weaknesses, opportunities, and challenges in the region as identified through data analysis and public outreach in the region. Several items listed in Figure 4.0 are then elaborated on in more detail below.

**Figure 4.0 SWOC of the Mid-Missouri Economy**

| Strengths / Opportunities | Weaknesses / Challenges |
|---|---|
| • Highly educated workforce<br>• Broadband – National leader in gigabit<br>• Highway and rail access<br>• Central location<br>• University of Missouri's economic development mission<br>• Job training resources<br>• Life science / bioscience sector and infrastructure<br>• Nuclear infrastructure including University of Missouri Research Reactor (MURR) and Callaway Energy Center<br>• Discovery Ridge Research Park<br>• Entrepreneurship development efforts growing in larger communities<br>• Competitive Electric Rates<br>• Tourism<br>• Quality of Life/Recreational Opportunities<br>• Low cost of living<br>• Healthcare<br>• Crime rates<br>• High economic resilience<br>• Redevelopment opportunities are abundant | • Losing talent to STL, KC and out-of-state<br>• Low unemployment rate<br>• Underemployment<br>• Lack of wet lab space<br>• No space/location for businesses graduating from MU Life Science Incubator<br>• Regional airport infrastructure<br>• Lack of port availability and access<br>• Lack of access to capital<br>• Transportation infrastructure condition and funding<br>• Transit services availability and access<br>• Connecting education and job training to existing jobs<br>• Aging utility infrastructure<br>• Wastewater infrastructure in small/rural communities<br>• Rural broadband outside of areas served by Co-Mo Electric and Socket Telecom.<br>• Not duplicating successes across the region<br>• Entrepreneurship resources, especially in rural communities.<br>• Lack of funding for small rural economic development organizations<br>• State government employee pay and employment levels |

## Strengths/Opportunities

**Broadband.** The availability of gigabit Internet speeds is increasing around the nation, but it is still a rare asset. It is especially rare in rural area. Many major metropolitan areas still do not have fiber to the home capabilities. Mid-MO RPC has three gigabit Internet service providers and five of Mid-MO RPC's six counties have residential gigabit broadband access. Gigabit Internet is even available in some of the most rural parts of the region due to Co-Mo Electric Cooperative's new gigabit fiber-to-the-home network.

**Highway and rail transportation.** Interstate 70, which runs through the heart of Mid-Missouri, is the most vital transportation asset in the region. It not only connects Mid-Missouri to the state's two largest cities -- St. Louis and Kansas City -- it also is also one of the nation's most heavily traveled roadways. Mid-Missouri is also a location where several important highways converge, including highways 63, 54 and 50. Potentially impactful highway projects in the region include rebuilding I-70 and converting Highway 50 into an entirely four-lane highway. This would connect Jefferson City, the state capital, to the state's two major metropolitan areas via a four-lane highway.

Rail access is a vital economic development asset, and five of Mid-Missouri's six counties have active rail lines running through them. The Union Pacific line that runs along the Missouri River and through Mid-Missouri is one of the most heavily utilized freight lines in the state. There are, however, several places around the region where rail spurs would allow communities to have better access these rail lines.

**University of Missouri's economic development mission.** The University of Missouri includes economic development as part of its mission. This emphasis on economic development has spawned hundreds of development efforts among academic units, faculty, students and affiliate organizations. The University has made economic development a priority and devoted resources in every department to this end. The aim is to assist private business development, transfer research and technology to the private economy, and to facilitate entrepreneurial expression of faculty knowledge, research and interest.

**Job training resources.** With more than 10 higher education institutions in Mid-Missouri, job training resources in the region are immense. The two-year institutions are particularly important job training assets. Moberly Area Community College's Mechatronics program is a model for the region and beyond. It is a textbook example of how the public and private sectors can work together to create a curriculum that meets the actual needs of manufacturers in a local community. State Technical College (STC) has a small campus in Jefferson City, but it's main campus in neighboring Osage County is a real destination where employers from around the country send employees to learn hard skills needed for high demand jobs. An increased presence of STC in the region would be a real asset. State Fair Community College's presence in Boonville is having a real impact on the community. When the Science Hall renovation is complete (made possible with the assistance of EDA funding), the expanded IT offerings will fill help fill the region's IT workforce needs.

**Life science / bioscience sector and infrastructure.** The establishment of the Christopher S. Bond Life Sciences Research Center and the Monsanto Place Life Sciences Business Incubator have been significant steps in growing a life science industry cluster in the region. This includes those industries that focus on the enhancement of quality of life through psychological, biological, medical research and engineering.

**University of Missouri Research Reactor (MURR).** The University of Missouri Research Reactor (MURR) is the key piece of infrastructure which is at the center of a new cluster developing in Columbia. MURR is the largest university nuclear research reactor in the country. MURR is key reason a radioisotope production company recently chose to locate in Columbia and several other companies have also expressed an interest in relocating to Columbia in order to utilizing material from MURR in their processes.

**Callaway Energy Center.** Nuclear energy production is a cornerstone of the Mid-Missouri economy with the Callaway Energy Center employing more than 750 employees. In recent years, proposals have been put forward to build a second nuclear power plant in Callaway County and to develop the capacity to manufacture small modular reactors (SMRs) in Callaway County but the projects have never fully materialized. Although the nuclear infrastructure at the Callaway Energy Center is a real strength for the region, in order for either of these proposals to fully develop, major infrastructure improvements would likely be needed to the surrounding area. In particular, road access to the Callaway Energy Center is in need of improvement.

**Entrepreneurship culture growing in larger communities.** The four largest cities in the region -- Columbia, Jefferson City, Fulton and Boonville -- have all placed a focus on entrepreneurship. Columbia, in particular, is a leader in this area with its annual pitch competition growing into a major event and other outreach activities starting to create a unique entrepreneurship culture.

**Tourism.** Tourism is an opportunity for Mid-Missouri to continue to develop. Destinations like University of Missouri sporting events, Isle of Capri Casino, Warm Springs Ranch (home to the Budweiser Clydesdales), and state capitol continue to draw visitors from outside the region. The University's move to the Southeastern Conference has resulted in a major increase in visitors during home football weekends in the fall. Tours of the former Missouri State Penitentiary in Jefferson City are also bringing new visitors to the region. Columbia's Roots & Blues and True/False Film Festival have started garnering national attention. The central location of the region makes it an ideal location for statewide events.

**Abundant redevelopment opportunities.** There are abundant opportunities in the region to redevelop large facilities that could have major impacts on the region. Boonville's redevelopment of the former Kemper Military Academy Campus continues to progress and there are still buildings in need of renovation in order to continue the progress being made. Jefferson City has two potential sites for renovation and revitalization. St. Mary's Hospital has recently moved into a new facility and its old facility -- located near downtown Jefferson City -- is currently unoccupied. The former Missouri State Penitentiary is a historic property that is starting to attract visitors to the area.

## Weaknesses/Challenges

**Low unemployment rate.** While low unemployment is a positive economic indicator, it is sometimes a challenge for economic development professionals in the region. It concerns some potential employers because it suggests that they may have a difficult time finding employees to fill their positions.

**Underemployment.** Underemployment is defined as when a worker is employed at less than full-time or at less skilled tasks than their training or abilities permit. The abundance of university's in the region contributes to a high level of underemployment. The region has a highly educated labor force, but not enough quality jobs to employ everyone up to their level of education. For this reason, a lot of the region's top talent leaves for St. Louis, Kansas City or somewhere out-of-state. Underemployment is a key concept for employers to understand that are hesitant to locate in Mid-Missouri because of a fear the region's low unemployment rate. Although individuals may already be employed, they are willing to change jobs if a job is created that better fits their set of skills.

**Lack of wet lab space.** Columbia is experiencing a major shortage of wet lab space. Increasing wet lab space is a top priority of the University of Missouri.

**Regional airport infrastructure.** The Columbia Regional Airport -- the region's only commercial airport -- has seen ridership increase in recent years, but infrastructure at the airport is lacking. A new terminal and increased runway capacity would allow the airport to continue to grow.

**Lack of port access.** During the most recent statewide transportation prioritization process, five of Mid-MO RPC's six counties identified establishing a port on the Missouri River as a project of interest. The Missouri River is an underutilized resource across the state and the region.

**Lack of access to capital.** Mid-Missouri is at a disadvantage to other metropolitan regions, particularly the St. Louis region, due to a lack of access to start-up capital for entrepreneurs.

**Not duplicating successes across the region.** There are many examples of local successes that need to be duplicated across the entire region. The MACC Mechatronics program and Co-Mo Electric Cooperative broadband network are just two examples of this need. In Columbia, the businesses community partnered with the local economic development organization and a local community college to create a job training program that meets the specific needs of the local manufacturing sector. There is potential for this model to be followed around the region. The Co-Mo Electric Cooperative broadband project is a model for the entire country, but could also serve as a model for other electric cooperatives in the Mid-Missouri region. Co-Mo Electric has been able to build its gigabit fiber-to-the-home broadband network without any federal or state grant dollars. In the same way that rural cooperatives brought electricity rural customers in the 1930s, they could be used to bring high speed internet to rural areas today.

**State government employee pay and employment levels.** The State of Missouri is the single largest employer in the region, but Missouri state employees are also the lowest paid state employees in the country. The number of state employees has also declined in the last five years. Low wages and reduced workforce from the region's largest employer are not positive developments for a regional economy.

# III. Strategic Direction

## The Vision

The citizens of Mid-Missouri and participants in the planning processes envision a region comprised of a nested network of cooperating communities, with robust and sustainable economies that support quality living for all the current and future residents of Boone, Callaway, Cole, Cooper, Howard, and Moniteau Counties.

Economic Development is most frequently described as the creation of jobs, the creation of wealth, and the improvement of life – *prosperity and pleasantness*. The process has also been described as three pronged – including activities aimed at retention, creation, and recruitment of wealth to the region. These aims – security, opportunity, and growth – describe well the vision of the stakeholders in the Mid-MO region.

*Prosperity*: A robust economy would be locally rooted, externally competitive, individualized (to eliminate unique problems and build on capacity), integrated (benefiting from the synergy that comes from collaboration), with forward looking plans playing a central role in development.

*Pleasantness*: The well being of citizens would be achieved through prosperity that enhances the places where people live, work and play while protecting and preserving resources.

More specifically, in the coming years the Mid-MO planning partners hope that the region contains a competent work force, diversity of small businesses and entrepreneurial enterprises, a diverse and sustainable energy supply, robust technology transfer to business – innovation, effective finance and governance, and ongoing maintenance and improvement of the infrastructure.

## The Mission

The Mid-Missouri Regional Planning Commission was formed to sustain and increase communication, cooperation, and coordination between the member governments in the creation of policies and activities for orderly economic and community development in the region.

The organization promotes sustainable regional cooperation – in community and economic development, in marketing efforts, and attempts to increase the number of new “quality” jobs created in specific targeted growth industries.

By providing leadership, facilitating the dissemination of information, building economic capacity, developing competitive attributes, and managing change – Mid-MO RPC and its partners and collaborators are expected to help the membership realize these dreams of providing security, opportunity, and growth for the region. The idea is to create and maintain an efficient, problem solving, results driven, organization that is responsive to the membership, is forward looking (anticipating changes), with a high degree of commitment and support from local government officials and private industry in the region.

The efforts of the Mid-MO RPC staff are to be focused on fostering partnerships with both public and private entities and through the timely and professional delivery of the core function of community and regional planning, infrastructure planning and financing, and economic development financing.

## Goals, Objectives and Strategies

Regional goals, objectives and strategies were formulated during the CEDS planning process with input from the Economic Development Advisory Committee, Mid-MO RPC membership, and numerous stakeholders from around the region. The goals, objectives and strategies of multiple planning and development organizations operating in the region have also been reviewed in order to discern areas of overlapping interest and to clarify the roles of the various organizations in regard to specific development activities. As a result, Mid-MO RPC planners have been able to identify areas where Mid-MO RPC may take a leadership role and which areas are more appropriate for Mid-MO RPC to take more of a supporting role.

The goals, objectives and strategies were designed to capitalize on regional assets and current opportunities and to respond to current and projected conditions in the region.

**Goal:** Job creation and retention, with an emphasis on quality jobs

**Objective:** Increase the number of quality jobs in the region by attracting new employers to the region and encouraging expansion of existing business, and retaining employers that have been the cornerstones of the Mid-Missouri economy.

- ***Strategy # 1*** – Provide linkages between communities or organizations and sources of funding and expertise for economic development activities.
- ***Strategy # 2*** – Provide direct technical assistance to communities and organizations for economic development activities.
- ***Strategy # 3*** -- Assist planning partners and other regional organizations with their identified economic development activities as follows:
    - Promote target clusters including regional strengths of bioscience/life science, advanced manufacturing, health science and services, information technology, and a potential cluster developing around Mid-Missouri's nuclear infrastructure (all partners)
    - Promote the region as a unique repository of a skilled and experienced labor pool (All partners)
    - Promote University of Missouri as a vital economic enterprise (UMC)
    - Technology transfer and entrepreneurial incubation (UMC)
    - Support efforts to develop a business accelerator facility that could serve as a location for businesses graduating from the MU Life Science Incubator (REDI, UMC)
    - Promote workforce development initiatives, especially those that focus on technical skills and/or closely incorporate employer-based curriculum (higher education institutions, local school districts, local economic development organizations, Chambers of Commerce, DED)
    - Promote tourism (DED) (CVBs)
    - Regional branding and marketing (CORE)
    - Improve economic opportunities for rural areas (USDA) (DED)

**Goal:** Development and maintenance of infrastructure

**Objective:** Maintain existing infrastructure and develop new infrastructure that will lead to economic development opportunities and improve the quality of life in the region.

- ***Strategy # 1*** -- Maintain the Mid-Missouri Regional Transportation Plan which identifies and prioritizes transportation projects on the MoDOT system for the region.
- ***Strategy # 2 --*** Promote local long range planning.
- ***Strategy # 3*** -- Assist partners with their infrastructure projects and initiatives.
    - Create competitive industrial sites (Chambers of Commerce)
    - Infrastructure required to promote University of Missouri as a vital economic enterprise, including MU Life Science Business Incubator at Monsanto Place, Discovery Ridge Research Park and a business accelerator facility

    - Promote improvements to the Columbia Regional Airport (REDI)
    - Infrastructure required for workforce development purposes (higher education institutions, DED)
    - Promote redevelopment of existing infrastructure including the former Kemper Military Academy, old St. Mary's Hospital facility and former Missouri State Penitentiary site (City of Boonville and JC Chamber)
    - Maintain an adequate supply and quality of housing stock and public facilities (DED)
    - Staff and participate in regional Transportation Advisory Committee (DOT)
    - Staff and support Regional Homeland Security Advisory Committee (DHS)
- ***Strategy # 4*** -- Provide member communities linkages to information about the latest infrastructure funding and initiatives.
- ***Strategy # 5* --** Promote the use of modern infrastructure management systems.
- ***Strategy # 6***-- Encourage the development of new parks, trails and other recreational opportunities both as a means to improve quality of life for residents and as potential attractions to encourage tourists and others living outside the region to visit.

**Goal:** Be competitive and prepared for opportunities

**Objective:** Ensure that Mid-Missouri communities and regional stakeholders do the background, preparatory, and marketing work that makes them eligible & able to take advantage of and be competitive for economic development opportunities.

- ***Strategy # 1*** – Provide direct technical assistance for members and regional entities and provide linkages to appropriate public and private sources of support for community and economic development activities.
- ***Strategy # 2*** – Assist communities with local comprehensive plans, economic development strategies, and other local planning efforts.
- **Strategy # 3** – Support and assist planning partners and other regional organizations with their community and economic development goals.
- ***Strategy # 4*** – Prepare, with the collaboration of the EDAC, a Comprehensive Economic Development Strategy every five years, and review the related work plans annually.

**Goal:** Entrepreneurship and small business development

**Objective:** Capitalize on current resources and develop additional resources for entrepreneurship and small business development.

- ***Strategy #1*** - Encourage the creation of capital investment resources including RLF development in the region.
- ***Strategy # 2* -** Assist partners in leveraging financing and technical resources for entrepreneurial and economic development activities.
    - Increase revenue from tourism (DED) (CVBs)
    - Assist the development of creative business plans (MU Extension)
    - Incubate and accelerate innovative biotech businesses (UMC)
    - Redevelop existing industrial sites (All partners)
    - Promote and support tourism organizations (all partners)
    - Promote and support small farm development (USDA)
    - Promote and support green technology (DED) (DNR)
- ***Strategy # 3* -** Promote collaborative marketing for business clusters.

**Goal:** An economically resilient region

**Objective:** Increase economic resiliency in the region.

- ***Strategy #1*** - Continue to promote and/or facilitate Continuity of Operations Planning (COOP) awareness to Mid-MO RPC members and area chambers of commerce.
- ***Strategy #2*** - Continue educational efforts on the need to consider resiliency principles in all planning activities.
- ***Strategy # 3*** - Support efforts to diversify the regional economy by attracting and developing new industries.
- ***Strategy #4*** - Support efforts to strengthen and diversify existing supply chains.

**Goal:** Informed communities, citizens and stakeholders

**Objective:** Ensure that the membership of the Mid-Missouri Regional Planning Commission, the citizens of the region, and stakeholders have current information about economic opportunities and activities that impact the economic health of the region.

- ***Strategy # 1*** – Obtain and disseminate information about current opportunities and developmental resources.
- ***Strategy # 2*** – Plan and facilitate regular meetings of the membership and various committees to review and respond to information about economic activities and opportunities.
- ***Strategy # 3*** – Keep abreast of "best practices" in regard to economic development by participation in professional organizations and systematically reviewing pertinent literature.
- ***Strategy # 4*** – Support and assist planning partners and other regional organizations with their identified educational and communication activities as follows:
    - Form and maintain strategic and mutually supportive alliances in the region (CORE)
    - Keep stakeholders informed and responsive to current site selection criteria (University Extension, Chambers of Commerce)
    - Maintain communications with major employers and stakeholders to identify and alleviate risks to stability (Chambers of Commerce)

**Goal:** An efficient and effective organization

**Objective:** Maintain and further develop Mid-MO RPC as an efficient and effective organization for the delivery of community and economic development services and increase staff capacity in order to better serve our membership, better collaborate with stakeholders and planning partners, and engage in dynamic community and economic development initiatives.

- ***Strategy # 1*** –Sustain and manage the funding necessary for the organization to employ appropriately skilled staff.
- ***Strategy # 2*** – Provide staff with education and development opportunities such that they keep abreast of current technology and best practices.
- ***Strategy # 3*** – Engage in continual outreach to members and community stakeholders to provide them the information they need to make best use of the RPC resources.
- ***Strategy # 4 –*** Collaborate with partners to share resources and avoid duplication of services.

# IV. Implementation/Action Plan

The Mid-MO RPC Board of Directors, the Economic Development Advisory Committee (EDAC) and Mid-MO RPC membership meet regularly and guide the implementation of the strategies identified in the CEDS. RPC staff and the EDAC—a standing committee comprised of economic development professionals and local elected officials and staff—take the lead in developing the annual work program and revising goals and strategies if necessary. EDAC meetings also serve as an important tool for partnership development. The Mid-MO RPC Board of Directors is responsible for prioritizing EDA Public Works and Economic Adjustment Assistance projects if such action is required.

## Action Plan - The Work Program

Mid-MO RPC submits annual work programs to EDA which reflect the work Mid-MO RPC staff will engage in over a one-year period. These work program are tied directly to the goals and strategies laid out in Mid-MO RPC's five-year Comprehensive Economic Development Strategy. The following work program reflects the activities Mid-MO RPC will engage in over the next year.

### Local Planning and Technical Assistance - WP #1

Mid-MO RPC staff will provide technical assistance to communities and local economic development organizations with community and economic development issues of local and regional importance. This activity could include providing information, giving presentations on local planning procedures and community development strategies, assisting with mapping needs, coordinating discussions with state regulatory and funding agencies, EDA grant writing assistance, and assisting local government membership with grant funding requests from other federal and state agencies. Full planning efforts may also be undertaken by the Commission in order to assist communities with developing community comprehensive plans and economic development strategies. The Commission may also assist communities and businesses with Continuity of Operations Planning (COOP) efforts.

### Economic Development Advisory Committee - WP #2

The Commission will continue to hold its Economic Development Advisory Committee (EDAC) meetings on a bi-monthly basis. EDAC meetings will include informational programs to assist MID-MO RPC membership with economic and community development efforts. Staff will also participate in local Chamber of Commerce activities to continue to promote the linkage of public –private partnerships in economic development activities.

### Community and Public Education Activities - WP #3

The Commission will educate communities in the region and the public on community and economic development issues through updating and enhancing its website for improved access to community and economic development programs and data. The Commission will also utilize newsletters, brochures and social media to educate communities about community and economic development opportunities. The website, newsletters, brochures and social media are designed to serve as a regional economic development marketing tools. The Commission is also planning to hold an economic development training workshop that will address economic development issues confronting communities in the region.

### Administration-Organizational Support Services-Professional Development - WP#4

The administrative activities for the economic development work element will include: writing the annual EDA planning partnership grant application, preparing and filing work quarterly (semi-annual) activity

reports and financial statements, preparing funding draw down documents and preparing and filing of all other grant administrative requirements. The Mid-MO RPC will continue to develop internal capacities and abilities by participating in relevant professional training opportunities.

## Relationship Between CEDS Goals and The Work Program

All of the annual work program activities are derived from and related to the goals and strategies outlined in the CEDS as noted below. Local planning and technical assistance, EDAC meetings and work with other economic development organizations, Community and Public Education Activities are the cornerstones of CEDS implementation. The individual activities listed under these work program categories are vital to implementing the overwhelming majority of CEDS goals. Appropriate administration of EDA planning partnership funding is vital, because without EDA funding Mid-MO RPC would struggle organizationally to implement any of the CEDS identified strategies. Professional development is vital to creating and maintaining an efficient and effect organization that is capable providing the services described in the work program.

**Goal:** Job creation and retention, with an emphasis on quality jobs

- Local Planning and Technical Assistance (WP #1)
- Economic Development Advisory Committee (WP #2)
- Community and Public Education Activities (WP #3)

**Goal:** Development and maintenance of infrastructure

- Local Planning and Technical Assistance (WP #1)
- Economic Development Advisory Committee (WP #2)
- Community and Public Education Activities (WP #3)

**Goal:** Be competitive and prepared for opportunities

- Local Planning and Technical Assistance (WP #1)
- Economic Development Advisory Committee (WP #2)
- Community and Public Education Activities (WP #3)

**Goal:** Entrepreneurship and small business development

- Local Planning and Technical Assistance (WP #1)
- Economic Development Advisory Committee (WP #2)
- Community and Public Education Activities (WP #3)

**Goal:** An economically resilient region

- Local Planning and Technical Assistance (WP #1)
- Economic Development Advisory Committee (WP #2)
- Community and Public Education Activities (WP #3)

**Goal:** Informed communities, citizens and stakeholders

- Local Planning and Technical Assistance (WP #1)
- Economic Development Advisory Committee (WP #2)
- Community and Public Education Activities (WP #3)

**Goal:** An efficient and effective organization

- Administration-Organizational Support Services-Professional Development (WP #4)

## Planning Partners/Organizational Resources

Partnerships are the single most important component of CEDS implementation. Strategic partnerships allow organizations to harness their collective strengths in a way that allows each organization to minimize their individual weaknesses. For this reason, it is important to identify strategic partners that Mid-MO RPC currently works with or may work with in the future in order to implement the strategies identified in the CEDS.

### Economic Development Organizations

**Missouri CORE (Connecting Our Regional Economy)** is a nonprofit economic development agency representing 5 mid-Missouri counties: Audrain, Boone, Callaway, Cole and Cooper. CORE facilitates the attraction of new businesses, promotes projects that have a region-wide economic impact, and assists communities in the expansion of existing and start-up businesses. missouricore.com

**Regional Economic Development Inc. (REDI)** is a nonprofit, public/private partnership created to enhance the vitality of business and increase the number of quality, sustainable jobs in Columbia and Boone County. REDI is funded by the City of Columbia, Boone County, the University of Missouri, the Columbia Chamber of Commerce, and over 100 local businesses and municipalities to coordinate the area's economic development activities. REDI is governed by a 19-person Board of Directors selected by and representing its public and private investors. The REDI staff also serve as the Economic Development Department of the City of Columbia. **Southern Boone EDC** and **Centralia Regional Economic Development (CREDI)** are smaller economic development organizations in Boone County dedicated to economic development in southern Boone County (Ashland area) and Centralia (northern Boone County). www.columbiaredi.com, investinsouthernboone.com, www.centraliaredi.org

**Jefferson City Area Chamber of Commerce** is the economic development organization for Jefferson City and Cole County. Its mission is to promote economic vitality and strength in the Jefferson City area and be a leading public policy advocate for business people; to provide valuable services to our members; and, fully participate and partner in activities that improve the economy and quality of life. www.jcchamber.org

**Callaway Chamber of Commerce** is the organization responsible for leading economic development initiatives throughout Callaway County. The Callaway Chamber as currently constructed is the result of a resent merger of the Fulton Area Chamber of Commerce (FACC), the Fulton Area Development Corporation (FADC) and the Show-Me Innovation Center (SMIC). The expansion of the chamber aims to fortify the current support for countywide economic development. www.callawaychamber.com

**Dr. Jim Gann** is the Economic Development Director for the City of Boonville and Cooper County. He also serves as the Director of Business Engagement with the Office of the Vice Provost for Economic Development at the University of Missouri. In his role as Economic Development Director, Dr. Gann leads economic development initiatives in Boonville and Cooper County. boonvillemo.org/economic-development

**Moniteau County Regional Economic Development (MRED)** is the economic development organization for Moniteau County. MRED strives to improve the economic well being and quality of life for the communities within the county, and recognizes that the creation of new jobs and retention of those on hand are vital to the economic growth of the area. MRED seeks to expand entrepreneurship opportunities and create an overall prosperity for the communities within Moniteau County. www.mred.biz

**Moberly Area EDC (MAEDC)** serves as the economic development organization for Howard County. MAEDC was organized in 1988 to promote economic growth and investment in Moberly and Randolph County.

Today MAEDC serves Randolph, Monroe and Howard counties with MAEDC functioning as the lead economic development for all counties. MAEDC is a non-profit, public/private partnership that works to promote new investment in the area in an effort to increase the quality of life for local citizens. www.moberly-edc.com

## Higher Education Institutions

**University of Missouri**
Higher education is the single biggest economic driver in Mid-Missouri. Columbia is home to the **University of Missouri**, the state of Missouri's flagship university. The University of Missouri is a $2.1 billion enterprise that accounts for 72% of the research dollars flowing through Missouri's public universities. MU boosts the economy by performing research, generating jobs, sharing knowledge, improving graduates' earning potential, and creating and commercializing businesses.

In FY2014, University of Missouri commercialization and tech transfer resulted in the following:

- $10.2+ million in gross licensing revenue
- 85 invention disclosures
- 322 MTAs executed
- 36 U.S. patents issued (577 since 2008)
- 107 U.S. technology patent applications filed
- 30 licenses and options executed
- 236 NDAs executed
- 291 licenses for new technologies signed since 2008
- 577 U.S. patents filed since 2008

**Lincoln University** is a historically black land grant university located in Jefferson City. The university was founded by African-American soldiers after the Civil War. Lincoln offers 50 undergraduate degree programs and Master's degree programs in education, business and the social sciences. The nursing program at Lincoln has an excellent reputation.

**Westminster College**, located in Fulton, has received numerous honors from U.S. News and World Report, The Princeton Review and Forbes. In 2015, it was one of only 125 colleges and universities in the country to be designated a STEM Jobs Approved College. Westminster is perhaps best known for being the place that Winston Churchill delivered his famous "Iron Curtain" speech in 1946. In recent years George Bush, Ronald Reagan, Mikhail Gorbachev, Margaret Thatcher, and Lech Walesa have participated in the College's international lecture series. Prominent on campus are National Churchill Museum and the monumental sculpture "Breakthrough," created from sections of the Berlin Wall.

**William Woods University**, located in Fulton, is a has received numerous honors from U.S. News and World Report. The university performs well in U.S. News and World Report rankings, including being recognized as the 2nd best university in the Midwest for graduates with the smallest amount of debt. William Woods signature programs include an internationally recognized equestrian studies program, a four-year American Sign Language interpreting program, and a criminal justice degree with homeland security emphasis.

**Central Methodist University** offers educational opportunities ranging from high-school dual credit to graduate degrees and has a total enrollment of more than 5,200 students statewide. CMU's main campus (known as the College of Liberal Arts and Sciences-CLAS) is located in Fayette. The university has a total of 16 campuses in Missouri, 8 out-of-state campuses and numerous online education opportunities.

**Moberly Area Community College's** Columbia campus is home to a new industry developed program called Mechatronics. The curriculum for the Mechatronics program was created through collaboration between

the Moberly Area Community College Columbia Higher Education Center, Regional Economic Development Inc., Columbia Area Career Center, Missouri Career Center and manufactures in the Columbia area including 3M, Kraft, Quaker, Gates Corp, and American Air Filter. The program was developed due to a high demand regionally and nationwide for well-trained technicians in the manufacturing sector. The Mechatronics program combines courses in electrical engineering, mechanical engineering, computers and control systems to train students in careers working as high-skilled technicians in modern manufacturing facilities. The curriculum places a strong emphasis on hands-on training in order to reinforce lessons learned in the classroom. When students complete the program they will have the ability to understand the manufacturing process from beginning to end and have the skills to troubleshoot anywhere along the production line.

**State Fair Community College's** Boonville campus is located at the site of the former Kemper Military School. At SFCC-Boonville, students can earn an Associates of Arts degree that can be transferred to a four-year college or university. The City of Boonville has been awarded an EDA Pubic Works grant to renovate the old Science Hall building for use by SFCC-Boonville. The renovated building will be used to offer students an opportunity to earn computer science related certificates that dramatically increase the employability of participating students.

**State Technical College of Missouri** is located just outside of the Mid-MO RPC region in Linn, Missouri, which is located approximately 20 miles east of Jefferson City. STC offers more than 35 technical programs at the associate of applied science degree and certificate level. STC also offers customized and contract training to Missouri business and industry. STC programs place a heavy emphasis on hand-on experience. This ensures the development of functional troubleshooting skills.

## Other Economic Development Planning Partners and Stakeholders

The **Missouri Partnership** is a public-private economic development partnership designed to increase the visibility of Missouri as a globally competitive business location and attract new jobs and investment to the state. The Partnership is recognized as a top economic development organization in the US, and works in partnership with the Missouri Department of Economic Development, the Hawthorn Foundation and economic development agencies across the state.

The **Missouri Workforce Development Board** represents a wide variety of individuals, businesses, and organizations throughout the State. The board engages employers, education providers, economic development, and other stakeholders to help the workforce development system achieve the purpose of the Workforce Innovation and Opportunity Act (WIOA) and the State's strategic and operational vision and goals outlined in the State Plan. WIOA is designed to help job seekers and workers access employment, education, training, and support services needed to succeed in the labor market, and match employers with the skilled workers needed to compete in the global economy.

The **Missouri Small Business & Technology Development Centers (MO SBTDC)** help businesses in every stage. From concept to startup, growth to renewal, mature to succession. They are designed to help businesses succeed at every point.

The **Missouri Technology Corporation (MTC)** is a public-private partnership created by the Missouri General Assembly to promote entrepreneurship and foster the growth of new and emerging high-tech companies. MTC focuses on 21st Century bioscience industries that build on Missouri's rich history in agriculture and technology.

The **Missouri Innovation Center** is a non-profit organization focused on providing support for high growth business ventures that improve human life and sustainability. It offers services in mentoring, securing financial support, and providing necessary resources for conducting successful and focused research and

development. The Missouri Innovation Center also serves as the resident manager of the MU Life Science Business Incubator.

**RMI** is a financial resource for improving the economic well-being of individuals, businesses and communities. RMI is an SBA Certified Development Company (CDC). which is authorized to make 504 Loans.

**Central Missouri Community Action (CMCA)** serves all six Mid-MO RPC counties by providing core services include job readiness training; job search assistance; career exploration and assessment; case management; financial assistance for certain career and technical training programs; and on the job training. Mid-MO RPC and CMCA work closely on mobility management issues in an effort to improve transportation access and efficiency throughout Mid-Missouri. CMCA and Mid-MO RPC have partnered to hire a mobility coordinator that is working with community stakeholders to create more efficient transit systems in central Missouri and connecting low-income individuals with rides.

## Funding Sources

Mid-MO RPC utilizes numerous funding sources in order to promote community and economic development in the region. Below are some of the funding sources most frequently used.

**Economic Development Administration (EDA**) planning partnership funding is a vital component of Mid-MO RPC's ability to develop economic development projects in the Mid-Missouri region. Public Works and Economic Adjustment Assistance grants from EDA have proven instrumental in the development of several major economic development projects in the region, including: construction of the MU Life Science Business Incubator at Monsanto Place, redevelopment of the Kemper Military Academy as an IT training center, and Discovery Ridge Research Park development.

**Missouri Community Development Block Grant Program (CDBG)**. The CDBG offers grants to Missouri communities to improve local facilities, address health and safety concerns, and develop a greater capacity for growth. State CDBG funds are only available to non-entitlement areas (incorporated municipalities under 50,000 and counties under 200,000). Metro areas receive and administer CDBG funds directly. The Mid-MO RPC and member communities make extensive use of CDBG funds for community services and infrastructure development projects. There are six categories of Community Development Block Grants as follows: Water and Wastewater, Industrial Infrastructure, Emergency, Community Facilities, Demolition, and General Infrastructure.

The **U.S. Department of Agriculture (USDA)** offers several grants and loans to communities in order to encourage rural development. Categories of USDA funding include rural housing, businesses programs, community programs, technical assistance and training grants, and faith-based and neighborhood partnerships.

**Missouri Department of Transportation (MoDOT)** has several funding sources available for local communities to improve their infrastructure. Popular programs include: transportation enhancements, transportation alternatives, off-system bridge replacement and rehabilitation, and safe routes to schools.

**Missouri Department of Natural Resources (DNR)** offers grants and loans for a variety of purposes. Funding types include: air quality, hazardous waste, historic preservation, outdoor recreation, soil and water conservation, solid waste management, water quality and environmental improvement and energy resources authority (EIERA).

## EDA Project Prioritization

EDA Public Works grants have proven instrumental in the development of several major economic development projects in the region, including: construction of the MU Life Science Business Incubator at Monsanto Place, redevelopment of the Kemper Military Academy as an IT training center, and Discovery Ridge Research Park development.

The success of EDA funded projects in the region has piqued the interest of several Mid-MO RPC planning partners that are now considering pursing EDA grant funding for projects that are currently under development. With a limited amount of EDA funding available and several planning partners expressing an interest in EDA grants, Mid-MO RPC has identified the need for a mechanism that will allow for the prioritization of EDA projects in the region if necessary.

Mid-MO RPC has identified the Mid-MO RPC Board of Directors as the appropriate entity for EDA project prioritization. The bylaws of the Mid-Missouri Regional Planning Commission allow each county in the region to have up to three seats on the Board of Directors. One representative from each county is a County Commissioner or designee from the County Commission. The other two seats are available for appointees chosen by two cities within the county. Cities within each county may petition their County Commission to have a representative on the Board.

Should a situation arise where project prioritization becomes necessary, the Mid-MO RPC Board of Directors will use an evaluation matrix to objectively analyze the projects under consideration and make a recommendation to EDA which project or projects are most in line with the region's adopted Comprehensive Economic Development Strategy (CEDS).

# V. Evaluation Framework

The Mid-Missouri Regional Planning Commission Board of Directors, the Economic Development Advisory Committee (EDAC) and Mid-MO RPC membership meet regularly and guide the implementation of the strategies identified in the CEDS. Progress is reported and monitored. A determination to add or change strategies may be made if conditions warrant. The results from data collection are also reviewed. As required by EDA, an annual CEDS report is created. The purpose of the annual CEDS report is to identify any changes in the economic conditions, resources and funding, and any other factors that may impact plan performance.

## Performance Measures

Given that the overarching goal for the region is economic development and that the ultimate purpose of all Mid-MO RPC activities is to foster prosperity in the region, the following information provides the best overall picture of the success of the CEDS strategies

- Number of jobs created and retained (Net Gain)
- Quality of jobs in the region (Pay and benefits)
- Number and types of projects undertaken in the region
- Amount of private sector investment in the region
- Changes in the economic environment of the region

Specific performance measures have been developed for each of the seven goals delineated in the CEDS as outlined below. This data will be compiled at least annually and reported to the Mid-MO RPC Board of Directors, EDAC and Mid-MO RPC membership. They will be used as a guide for the preparation of the annual report on economic development activities and for the ongoing process of assessing, refining and prioritizing annual work programs.

**Goal:** Job creation and retention, with an emphasis on quality jobs

- Retain existing jobs and increase in net employment in the region
- Increased employment within target sectors/clusters
- Increased tourism/visitors to the region
- Expansion of existing and/or development of new job training programs and opportunities
- Description of regional partnership accomplishments

**Goal:** Development and maintenance of infrastructure

- Maintain and expand existing transportation network including roads, bridges, airports, rail, and ports. List and description of projects in progress or completed in reporting period
- Maintain and expand utility and broadband infrastructure
- Reports from Transportation Advisory Committee (TAC) and Regional Homeland Security Oversight Committee (RHSOC)
- Description of regional partnership accomplishments

**Goal:** Be competitive and prepared for opportunities

- Timely completion of approved CEDS and annual work plans
- Response to requests to local planning assistance
- Local planning efforts completed
- Description of regional partnership accomplishments

**Goal:** Entrepreneurship and small business development

- Evidence of entrepreneurship development through increased entrepreneurship resources
- Increased tourism/visitors to the region
- Description of regional partnership accomplishments

**Goal:** An economically resilient region

- Records of resiliency promotion
- Description of regional partnership accomplishments

**Goal:** Informed communities, citizens and stakeholders

- Membership satisfaction with quality of information received
- Records of informational meetings and written communication
- Description of regional partnership accomplishments

**Goal:** An efficient and effective organization

- Employee production and quality
- Organizational audit
- Appropriateness of requests for services
- Description of joint ventures with related agencies

The information for reporting on these criteria is currently being gathered by Mid-MO RPC or external entities. Timely data is available to Mid-MO RPC on an ongoing basis. It is expected that the timeliness and usefulness of data gathering efforts will continue to improve over time.