

EASTERN SHORE OF VIRGINIA
REGIONAL ECONOMIC DEVELOPMENT PLAN

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY • STRONGER ECONOMIES TOGETHER

2017-2022



PREPARED BY:

ACCOMACK-NORTHAMPTON PLANNING DISTRICT COMMISSION

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DECEMBER 2017

UPDATED JUNE 2018

EDA

U.S. ECONOMIC DEVELOPMENT ADMINISTRATION

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EXECUTIVE SUMMARY

The Eastern Shore of Virginia is a region with a strong and unique regional identity that is directly tied to the land, water, and outer space. This Regional Economic Development Plan is intended to complement and strengthen existing regional plans and provide a roadmap for future economic development and growth.

During 2017, the Accomack-Northampton District Commission's (A-NPDC) Economic Development Committee (EDC) completed a process to merge the existing Comprehensive Economic Development Strategy and Stronger Economies

Together Economic Development Plan into one comprehensive document which satisfied the requirements of the U.S. Economic Development Administration and the U.S. Department of Agriculture.

Key business, civic, and community leaders have embraced a spirit of regionalism to support this initiative. A series of six public work sessions where regional stakeholders worked collectively and diligently were held between October 2015 and May 2016. It is expected that implementing the action items described within this document will strengthen the ability of the Eastern Shore of Virginia to secure its economic future and position itself as a competitive region.



Significant research, analysis, and discussions led to the development of this plan. Specifically, the following information identified by the participants was critical to the development of the action plans produced through this planning process:

- Regional strengths, challenges, opportunities, and resources were identified. **Education, infrastructure, and business development/support** were selected as top priority opportunities.
- Four cluster groups were selected for inclusion in the plan: **Aerospace & Defense; Agribusiness & Food Processing; Arts, Entertainment, Recreation, & Visitor Industries; and Foundational & Entrepreneurship Development.**
- The four cluster groups developed SMART goals that were refined over the course of several months before being included in the final plan. Aerospace & Defense goals were generally focused around **growing the Wallops Complex, increasing unmanned systems operations, and coastal research.** The Agribusiness & Food Processing group developed goals intended to **forward a value-added fresh food marketing cooperative, create a wholesale production facility, enhance workforce**

development opportunities, and advance the regional forestry industry. Arts, Entertainment, Recreation, and Visitor Industries' goals were focused around **developing the region as a well-managed tourism destination; creating hospitality, ambassadorship, mentorship & internship programs; enhancing revenues supporting local tourism; and development of recreational facilities.** Foundational & Entrepreneurship Development goals were generally focused on **building an entrepreneurship culture in the region, increasing funding access for local small business efforts, increasing market & value-add opportunities, and developing infrastructure to facilitate local businesses.**

- A number of goals and objectives addressing steady-state and responsive economic resilience were incorporated into the action plans following an assessment to identify vulnerabilities and ongoing and current economic resilience initiatives.

A framework for ensuring the plan will remain as a living and relevant document has been established where four standing subcommittees of the EDC focusing on the cluster group action plans were created. These subcommittees will meet regularly to monitor, measure, and strategize for the development of existing goals, objectives, and strategies and pursue and develop strategies for emerging opportunities. Stakeholders and the public are encouraged to participate in these meetings ensuring a large and diverse fingerprint on the plan. All proposed changes to the four industry sector action plans will then be presented to the EDC, who will be responsible for making the final determination for which actions are included in the plan. Following a public comment period during November 2017, the plan was approved by the EDC.

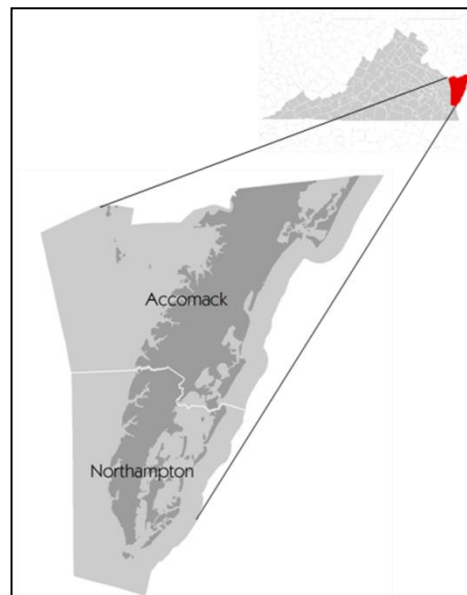
OVERVIEW

ACKNOWLEDGEMENTS

The Eastern Shore of Virginia would like to thank the staff from the U.S. Economic Development Administration, U.S. Department of Agriculture Rural Development, Virginia Department of Housing and Community Development, Regional Rural Development Centers, and Virginia Cooperative Extension for their support. We would also like to show our appreciation to Accomack and Northampton Counties, the Town of Chincoteague, Eastern Shore Community College, Eastern Shore of Virginia Tourism Commission, Eastern Shore of Virginia Chamber of Commerce, Chincoteague Chamber of Commerce, Virginia Cooperative Extension, NASA Wallops Flight Facility, Perdue Farms, the members of the Accomack-Northampton Economic Development Committee, the distinguished individuals that took part in the public input sessions, and numerous other individuals for their invaluable insight and ideas that led to the creation of this plan.

EASTERN SHORE OF VIRGINIA DESCRIPTION

The Eastern Shore of Virginia has a strong, historic regional identity. It is bound on three sides by the Atlantic Ocean and Chesapeake Bay and its economy is intertwined across Accomack (pop. 33,164) and Northampton (pop. 12,389) Counties and 19 Incorporated Towns. The region's dynamic economic history has been closely tied to its abundant natural resources and proximity to urban centers. Beginning after the Civil War, the steamboat and then the railroad and trucks opened opportunities for local watermen and farmers to sell to new markets in nearby urban centers including Hampton Roads and Richmond, Virginia; Annapolis and Baltimore, Maryland; Washington, D.C.; Philadelphia, Pennsylvania; and New York, New York. The region's economy thrived during the late 19th and early 20th centuries and by 1921 federal experts considered Accomack and Northampton Counties the most affluent agricultural counties in the United States. The Eastern Shore of Virginia's rural and relatively pristine environment has long made it one of the more desirable areas for visiting and recreating along the Atlantic seaboard. In more recent decades, the region's economy has diversified to include a burgeoning aquaculture industry and the aerospace and defense industry associated with the NASA Wallops Flight Facility and Mid-Atlantic Regional Spaceport.



The region's geographic isolation from the rest of Virginia and the similarities among local communities have supported the unique comraderie and regional spirit which characterizes Virginia's Eastern Shore. The General Assembly recognized this in 1969 when it divided the Commonwealth into 22 planning districts including the Accomack-Northampton Planning District. The Accomack-Northampton Planning District Commission (A-NPDC) has supported regional economic development on Virginia's Eastern

Shore since its inception and in 2003, the U.S. Department of Commerce Economic Development Administration designated the region as an Economic Development District.

Evidence demonstrating the economic linkages in the region has been documented by several studies including the Origin-Destination Employment Statistics from 2011. This data shows that 963 Accomack residents commute to employment in Northampton County and conversely 1,266 Northampton County residents commute to employment in Accomack County. These two counties each are the largest employment center for each other's residents outside of the counties themselves. Additionally, the 2011 Internal Revenue Service county to county migration data demonstrates the same pattern with each county representing the most significant destination for out migration of the other.

The Regional Economic Development Plan is intended to build from existing economic development plans for the Eastern Shore including the Stronger Economies Together (SET) Regional Economic Development Plan since 2016 and the Comprehensive Economic Development Strategy (CEDs) since 2002. The SET and CEDs initiatives and other regionally-collaborative efforts have confirmed that the communities and businesses on Virginia's Eastern Shore are both willing and capable of successfully implementing economic actions on a regional scale.

REGIONAL ECONOMIC DEVELOPMENT BACKGROUND

Comprehensive Economic Development Strategy (CEDs)

In 2003, Accomack and Northampton Counties were designated as an Economic Development District (EDD) by the U.S. Economic Development Administration (EDA). This designation makes the Eastern Shore of Virginia eligible for EDA funding and has been critical for the successful completion of several key facilities and initiatives within the region including the Eastern Shore Community College Workforce Development and Training Center, Accomack Airport Industrial Park, and Virginia Space Flight Academy.

To retain this EDD designation, the EDA requires that a Comprehensive Economic Development Strategy (CEDs) be prepared every five years and updated annually with input from the community. The CEDs strives to contribute to effective economic development through a locally-based, regionally-driven economic development planning process. The original CEDs for the Eastern Shore of Virginia was developed in the early 2000s with the most recent editions occurring in 2012 and 2017.

Stronger Economies Together (SET) Initiative

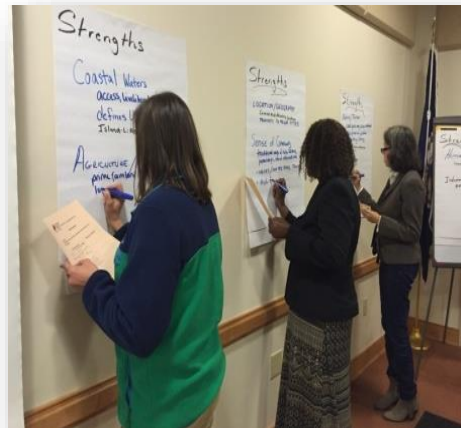
Launched in 2009 by USDA Rural Development in collaboration with the nation's Regional Rural Development Centers (RRDC) and their land-grant university partners, the purpose of Stronger Economies Together (SET) is to strengthen the capacity of communities in rural America to work together in developing and implementing an economic development blueprint that strategically builds on the current and emerging economic strengths of their region. The SET program provides economic analyses that are tailored to capture the region's current or emerging clusters and comparative economic advantages.

The Accomack-Northampton Planning District Commission, with commitment from several key regional institutions, pursued SET for the Eastern Shore of Virginia because the process incorporates a large number of people and naturally fits with the culture of the region. Additionally, SET focuses on existing assets and industries and incorporates industry-specific analysis. Furthermore, it was expected that SET

PLAN DEVELOPMENT, MAINTENANCE, & IMPLEMENTATION

REGIONAL COLLABORATION

The plan has buy-in from several key decision-makers in the region including Accomack and Northampton Counties, Town of Chincoteague, Eastern Shore Community College, Eastern Shore of Virginia Tourism Commission, Eastern Shore of Virginia Chamber of Commerce, Chincoteague Chamber of Commerce, Virginia Cooperative Extension, NASA Wallops Flight Facility, Perdue and other entities represented by members of the Accomack-Northampton Economic Development Committee (EDC). The EDC is comprised of 25 members and 5 technical advisors responsible for maintaining and implementing this plan (see **Appendix A**).



Supporting entities including local businesses, academic institutions, and local governments expressed commitment to support the plan's implementation by submitting letters of support and commitment, by participating actively in the plan development work sessions, by developing actions for implementing the goals established in the program, by reviewing and editing drafts of the plan, and incorporating public comments received.



Public comment has been incorporated at several stages during the plan development process beginning in the Fall of 2015 with the SET Civic Forum and subsequent work sessions. During these events, the public was encouraged to participate and provide input and support for the plan. The public was again invited to provide input through a public meeting hosted on May 2, 2016 at the Eastern Shore Community College, a series of open houses hosted at six locations around the region from May 2 to May 6, 2016, and through a presentation to the A-NPDC. During 2017, additional opportunities were provided for public participation and comment. These opportunities included EDC meetings in February, June, and September; 8 subcommittee meetings in April and November; and a series of open houses at six various public locations around the region during November. Public comments received during 2017 are included in **Appendix B**.

PLAN MAINTENANCE AND IMPLEMENTATION

The EDC is the entity responsible for maintaining and implementing the Regional Economic Development Plan. The overall goal is to maintain the plan as a living document that evolves as actions

are completed, altered, or abandoned or as new regional opportunities arise. During its February 2017 meeting, the EDC created four standing subcommittees that will meet bi-annually and intermittently with the EDC to work specifically on maintaining and implementing the four industry sector action plans. Any updates, alterations, or additions made to the action plans during the subcommittee meetings are then presented to the EDC, where the proposals will be considered, discussed, and included or excluded from the plan. The subcommittee meetings are open to any interested members of the public. The EDC has established rough guidelines for its consideration of actions proposed for inclusion in the regional plan: actions must be evidence-based, must be quantifiable with identified metrics, and capacity for successful completion must exist and be identified with responsible parties and timelines defined.



This process is intended to provide an environment where regional collaboration can flourish on a regular and scheduled basis. The expected outcome is that the action plans remain relevant and responsible parties are held accountable for progress towards successful implementation.

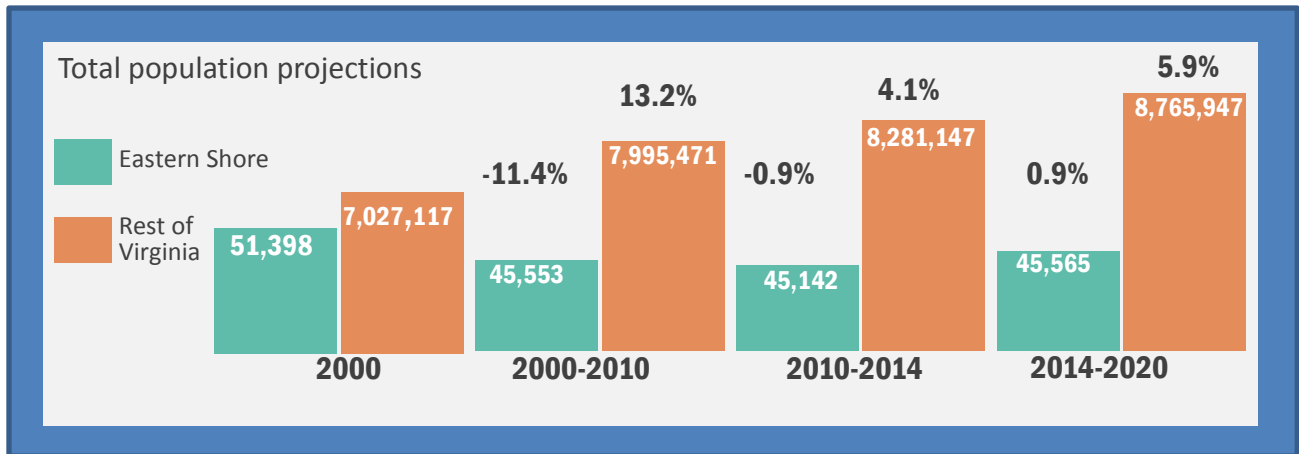
A-NPDC staff will coordinate all meetings and the A-NPDC website (www.a-npdc.org) will host all plan materials, documents, updates, and links to regional resources.



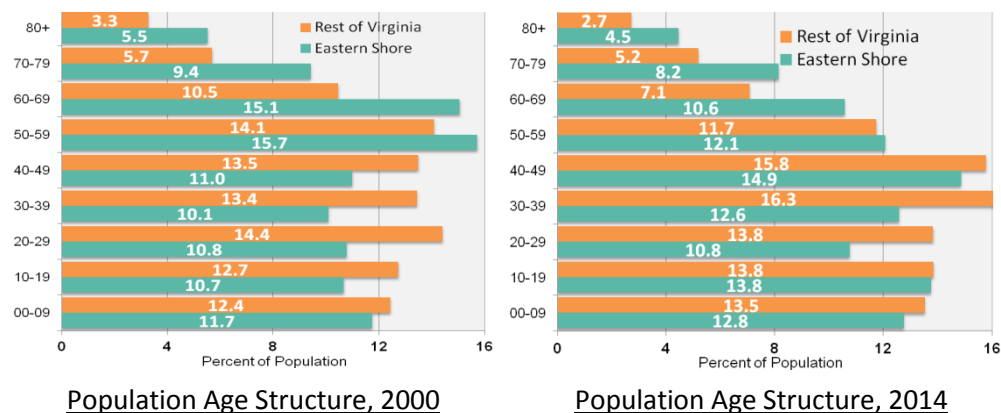
REGIONAL ECONOMIC DEVELOPMENT CONDITIONS: EVIDENCE BASIS FOR THE PLAN

REGIONAL DEMOGRAPHIC DATA

The Eastern Shore of Virginia’s population has experienced significant decline except for a small uptick projected for 2014-2020. The population in 2014 is 11.3% lower than in 2000. Conversely, Virginia’s population has experienced continuous growth through 2000 and projected to 2020. The impacts of the economic recession of 2008-2009 can be seen in the figure below as the growth rate fell from 13.2% to 4.1% between 2000 period and the 2010-2014 period.



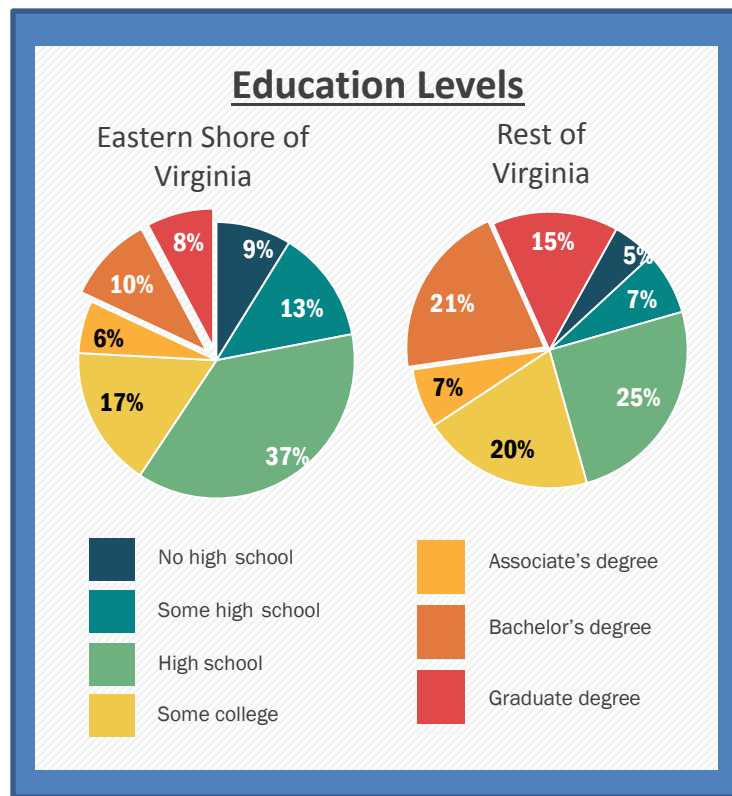
The region had roughly the same proportion of children and young people as the rest of the Commonwealth in 2000. There was a somewhat smaller proportion of working adults ages 20-59, and a higher proportion of older residents. Data shows that the Eastern Shore has an aging population, with higher proportions of the population above 60. The proportion in the prime working years of 20-60 has remained roughly stable from 2000-2014, but the proportion of children and young people has fallen as a proportion of total population.



The proportion of the total population and young population in poverty has risen from 2003, but appears to be leveling off (similar to the U.S. rate). However, 1 in 5 Eastern Shore residents live in poverty and over 30% of children below 17 live in poverty. The real median household income has not fluctuated a great deal since 2003, although it is lower in 2013 than in 2008. The real median income is considerably below the U.S. median household income.

	2003	2008	2013
Total Population in Poverty	16.2%	20.3%	20.1%
Minors (Age 0-17) in Poverty	25.3%	29.9%	30.7%
2013 Real Median Household Income*	\$37,891	\$39,765	\$37,570

The proportion of Eastern Shore residents with no education beyond elementary school is 9% in 2013 versus 5% in the rest of Virginia. However, 50% of Eastern Shore residents have some high school or have completed high school, a much higher proportion than the rest of Virginia. The proportion with a bachelor's degree or graduate degree is smaller than the rest of Virginia. Thus less than 1 in 5 Eastern Shore residents have a bachelor's degree or higher.



REGIONAL ECONOMIC DATA

In their publication *Placing the Rural in Regional Development*, Neil Ward and David Brown of Cornell University suggested that whether in the United States or the United Kingdom, rural development policy has shifted to emphasize natural and cultural amenities (place-based policies) including explicit strategies to make rural places more competitive using an investment-oriented approach (investments instead of subsidies). The diversity of rural areas necessitates planning at a regional rather than national level; however, rural localities' economies are often tied to the nearest population centers and other nearby economies, so regional planning is likely more effective than local planning alone.

Placing the Rural in Regional Development by Neil Ward & David L. Brown (November 2009).

<http://www.tandfonline.com/doi/pdf/10.1080/00343400903234696>

Understanding the importance of building a regional economic plan, Virginia’s Eastern Shore analyzed the industry cluster data to identify emerging, star, mature, and transforming clusters. The regional cluster analysis revealed 1 star cluster (Arts, Entertainment, Recreation, and Visitor Industries), 7 emerging clusters, and 3 mature clusters with even more transforming clusters. This analysis was used to support collaboration among the stakeholders for the purpose of finding the distinct regional advantages of the Eastern Shore and designing economic activities that will position the region to effectively compete in multi-state, national and/or international markets.

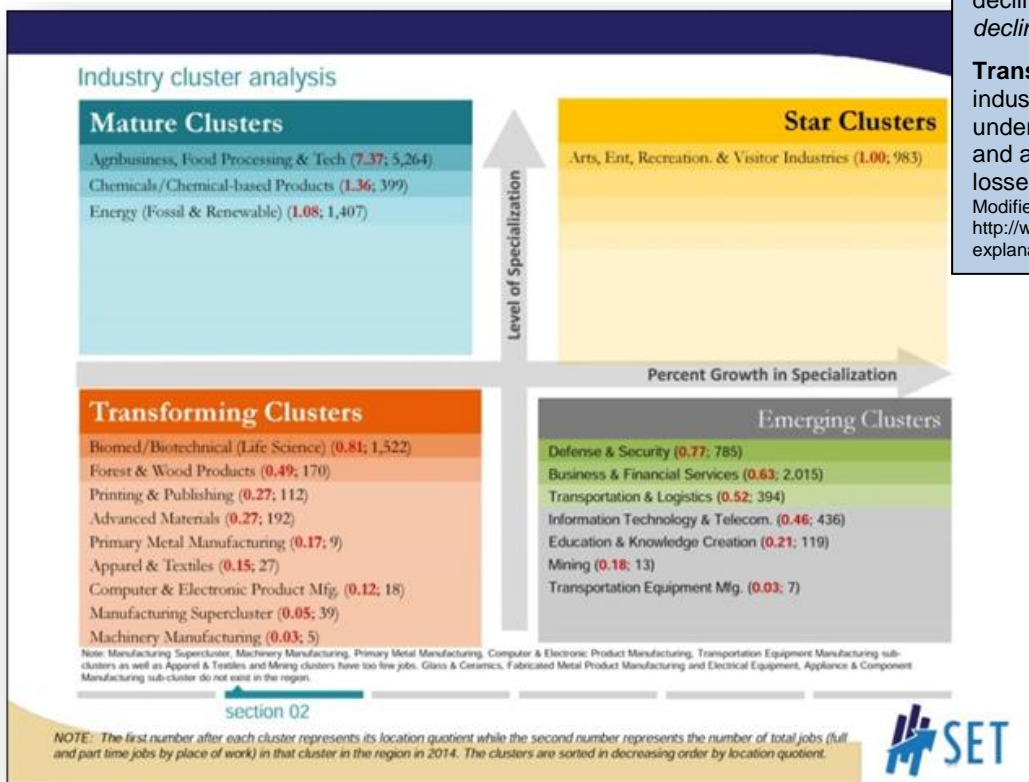
Emerging (bottom right): Contains industry clusters that are under-represented in the region (low Location Quotient (LQ)) but are growing. *Weak but advancing*

Stars (top right): Contains industry clusters that more concentrated in the region (LQ over 1) and are growing. *Strong and advancing*

Mature (top left): Contains industry clusters that are more concentrated in the region (LQ over 1) but are decreasing or declining (job losses). *Strong but declining*

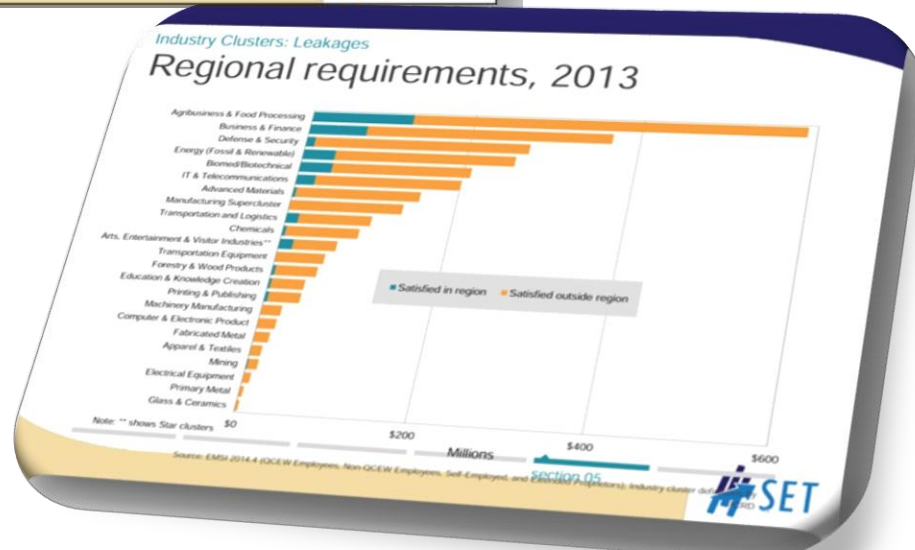
Transforming (bottom left): Contains industry clusters that are underrepresented in the region (low LQ) and are also decreasing or declining (job losses). *Weak and declining*

Modified from:
<http://www.charlestonregionaldata.com/bubble-chart-explanation>



As part of the analysis, a review was conducted on each cluster’s potential for capturing new market share. The review encouraged consideration of all the suppliers and producers that bring a product or service into existence and where the possibility for new development exists.

The Eastern Shore observed economic leakage in its star cluster agribusiness and food processing and in a key emerging cluster, defense and security.



REGIONAL ASSETS

Virginia’s Eastern Shore has an abundance of cultural and natural assets which have historically been at the center of the regional economy. The continuing trend of increasing the use of sustainable practices for these assets has resulted in additional potential for future economic benefit. In addition, the people who populate the region are invested in its success and exhibit a work ethic required for proactive work. Historically, the main barrier to specific regional economic development has generally been the result of divergent strategies. These barriers are offset by advantages such as a strong regional identity, the people of Accomack and Northampton call themselves Eastern Shoremen, and the sense that we need to do the work to improve the Eastern Shore.

Regional assets identified include:

➤ **Our Abundant Access to Coastal Waters (Natural Capital)**

- Provides livelihood opportunities and hobbies which define us
- Island-like isolation

➤ **Our Agriculture**

- Prime farmland, good soils, long growing season, access to water
- Crop diversity
- Strong promotion of agriculture

➤ **Our Aquaculture**

- Significant growth of small-scale aquaculture businesses

➤ **Our Location/Geography**

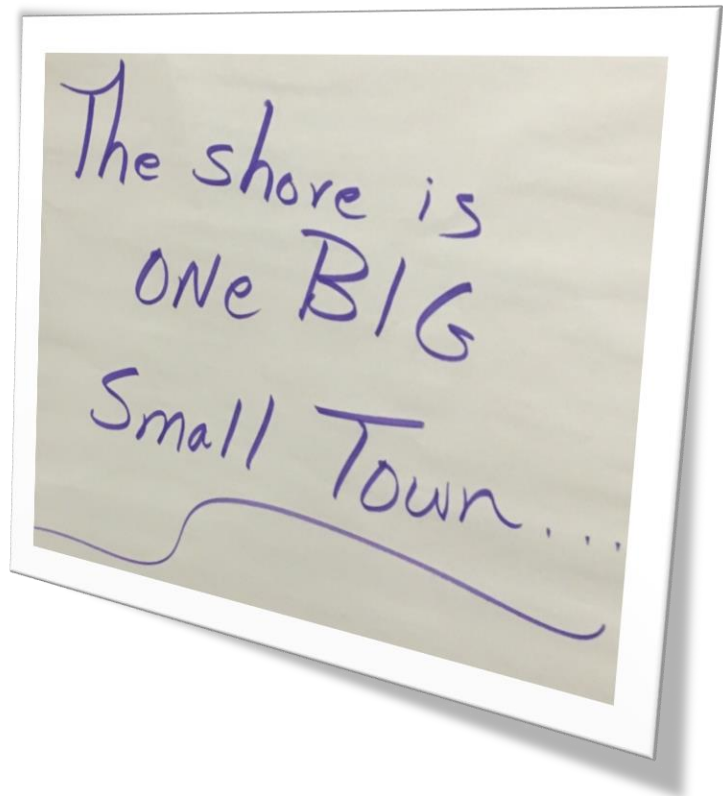
- Centrally-located in Mid-Atlantic
- Close proximity to many major cities

➤ **Our Sense of Community**

- Traditional ways of life
- History
- Partnerships
- Social interactions
- Values
- One Big Small Town
- Access to high-tech markets
- STEM opportunities

➤ **Our People (Human Capital)**

- Local Shore culture



- Retirement Community with broad background of interest and experiences
- People-friendly

➤ **Our Nature/Tourism**

- Rural/natural beauty/blank canvas to build upon
- Quiet way of life
- Undeveloped
- Nature preserves
- Seafood
- Birds and wildlife
- Hunting and fishing
- Historic and natural resources

- Ecotourism
- **Our History/Heritage**
 - Culture
 - Traditional way of life
 - Pride of heritage/history
 - A blank canvas for growth, yet a deep desire to maintain traditions/history

➤ **Industrial Infrastructure (Built Capital)**

- Airport
- Two Industrial Parks
- Central Water and Wastewater Systems
- Wallops Island, Virginia Space, and Wallops Research Park

➤ **Racial Diversity**

- **Growth in retirement age**
 - This presents new opportunities for work due to aging/retiring population

Population by Race/Ethnicity

	PDC 22	Virginia	United States
Total			
Total Population	45,553	8,001,024	308,745,538
Race			
White	28,830	5,486,852	223,553,265
Black or African American	13,831	1,551,399	38,929,319
American Indian or Alaska Native	162	29,225	2,932,248
Asian	266	439,890	14,674,252
Native Hawaiian/Pacific Islander	53	5,980	540,013
Other	1,695	254,278	19,107,368
Multiple Races	716	233,400	9,009,073
Ethnicity			
Not Hispanic or Latino (of any race)	41,829	7,369,199	258,267,944
Hispanic or Latino (of any race)	3,724	631,825	50,477,594

Source: 2010 Census.

- Retirees could volunteer, tutor, mentor, and provide new expertise within region
- Retirees relocating to Shore bring unique knowledge, skills & experience
- **Growth in small business (Stage 0-1)**
- **Growth in education**
 - Higher secondary graduation rates
- **Low-cost labor force**

POTENTIAL BARRIERS AND RELATED STRATEGIES

Virginia’s Eastern Shore is not without its barriers to economic growth. Interestingly, many of the barriers proposed by participants during the 2016 SET process are associated with the region’s assets. Although generally broad and often interconnected issues, the list of barriers will challenge but not defeat the region. Barriers include:

- **Lack of Opportunity and Higher Education Jobs**
 - Unable to bring young career folks back to the Shore
 - Opportunities for families, children, and businesses
- **Public School Quality**
 - Inadequate social development
 - Underfunded and unstable
- **Poverty Level and Public Health**
 - Lack of affordable health care
 - Lack of affordable housing
- **Lack of Shared Vision, Cohesiveness, and Leadership**
- **Lack of Skilled Workforce**
 - Ability to attract and retain business
- **Geographic Isolation**
- **Division Within the Region**
 - Geographically (Bayside/Seaside, Accomack/Northampton, Counties/Towns, Islands/Mainland)
 - Racially
 - Religiously
- **Lack of Critical Mass**
 - Insufficient numbers of people and businesses to support necessary infrastructure and services
 - Lack of public transportation
 - Lack of access to water and sewer

- Inadequate dissemination of internet service
- Challenges one has to go through to get ideas accomplished on the local level

➤ **Government Regulations**

Through the regional economic development plan process, consideration has been given to understanding a broad host of identified challenges ranging from in/out migration from the Shore by age group, trends in retirees locating to the Shore, availability of better aquaculture and agriculture data, education trends, and localized key economic indicators. The region must capture and analyze data on the:

- Number of people leaving the area, especially young professionals
- Higher education attainment in the region
- Resources for low income, poverty and retirees challenges to the health system
- Influx of retirees may not have a positive effect of support in the schools
- Unskilled workforce
- Lack of training for trades in the school system
- Cheap labor sometimes attracts less desirable businesses and/or employees
- Low taxes=lower teachers wages which doesn't always attract the best teachers
- Issues retaining the teachers currently in the region
- Lack of housing for this demographic
- Education connection to the regional industrial, agriculture, aquaculture
- Aquaculture and agriculture regional economic impact
- Sales are down but agriculture experienced an increase in prices
- Forecast of lower commodity prices
- Infrastructure including water/sewer and transportation
- Utilize Route 13
- A lot of NASA employees settle in and commute from Maryland
- Identify financial resources



REGIONAL ECONOMIC GOALS

Eastern Shore leaders carefully examined the regional demographic and economic data and engaged in challenging debates on the potential for developing Stars and Emerging clusters, as well as supporting those clusters that were maturing or transforming. Based on the evidence, four focus clusters were selected during the 2016 SET planning process and have been merged with previously identified CEDS priorities. These include:

- ***Aerospace and Defense,***
- ***Agribusiness and Food Processing,***
- ***Arts, Entertainment, Recreation, & Visitor Industries***
- ***Foundational & Entrepreneurship Development***

Each of the cluster areas were investigated by dedicated teams of citizens who worked to reach consensus on goals and strategies that would support economic growth. Accomplishing the goals will capitalize on the Shore’s assets including agriculture, nature, history, coastal waters, and its unique aerospace and defense industry. Successful implementation of the strategies addresses the critical barriers to economic growth including preparation of a skilled workforce, expanded opportunity for higher paying jobs, and an increased tax revenue.



EASTERN SHORE OF VIRGINIA REGIONAL ECONOMIC GOALS

AEROSPACE & DEFENSE

GOAL 1: GROW THE WALLOPS COMPLEX (NASA WALLOPS, VIRGINIA SPACE, & WALLOPS RESEARCH PARK) INTO THE NATION'S SPACEPORT-OF-CHOICE FOR ACCESS TO SPACE FOR THE PLATFORM SPECTRUM FROM NANO/MICROSATS TO SMALL SATELLITES, RETURN SPACE VEHICLES THROUGH MEDIUM CLASS ORBITAL MISSIONS SUPPORTING THE NATION'S SCIENCE, TECHNOLOGY, NATIONAL DEFENSE, & COMMERCIAL OBJECTIVES.

GOAL 2: INCREASE TECHNOLOGY DEVELOPMENT, MANUFACTURE, & OPERATIONS FOR UNMANNED AERIAL, UNDERWATER, & GROUND BASED SYSTEMS (UNMANNED SYSTEMS (UMS) IN THE EASTERN SHORE OF VIRGINIA REGION. THIS SHALL INCLUDE THE FULL SPECTRUM OF ACTIVITIES FROM DESIGN THROUGH MANUFACTURE, PILOT TESTING, TEST, & OPERATIONS. THE GOAL WOULD BE TO INCREASE THE NUMBER OF LOCAL JOBS & OPERATIONAL HOURS BY 25% EACH YEAR FROM A BASE YEAR OF 2016.

GOAL 3: DEVELOP & MARKET TWO RESEARCH PROGRAMS TO INCREASE REGIONAL COASTAL RESILIENCE BY 2020.

AGRIBUSINESS & FOOD PROCESSING

GOAL 1: DEVELOP A VALUE-ADDED FRESH FOOD MARKETING COOPERATIVE TO AGGREGATE & MARKET LOCALLY PRODUCED AQUACULTURE, PRODUCE & VITICULTURE; CREATE AN IDENTIFIABLE EASTERN SHORE BRAND; INCREASE CROP DIVERSITY; & INCREASE PRODUCTION AND SALES BY 20% BY DECEMBER 2018. THIS GOAL SUPPORTS & TARGETS SMALL FARMERS.

GOAL 2: DEVELOP A WHOLESALE PRODUCTION THAT SUPPORTS LARGER-SCALE FARMERS TO ADD VALUE TO CROPS AND AQUACULTURE GROWN ON THE SHORE & CREATE VALUE-ADDED OPPORTUNITIES.

GOAL 3: DEVELOP A SAWMILL ON THE EASTERN SHORE OF VIRGINIA BY DECEMBER 2018. (PINE)

GOAL 4: EQUIP INDIVIDUALS WITH APPROPRIATE SKILLS TO WORK IN THE AGRIBUSINESS & FOOD PROCESSING CLUSTER.

ARTS, ENTERTAINMENT, RECREATION, & VISITOR INDUSTRIES

GOAL 1: DEVELOP THE EASTERN SHORE AS A WELL-MANAGED TOURISM DESTINATION.

GOAL 2: IMPLEMENT AN AMBASSADORSHIP, MENTORSHIP, & INTERNSHIP PROGRAM TO EDUCATE WORKERS & CITIZENS ON HOSPITALITY & TOURISM OPPORTUNITIES.

GOAL 3: ENGAGE LOCAL GOVERNMENTS IN ENHANCING SUPPORT FOR TOURISM.

GOAL 4: GROW THE ARTS INDUSTRY INTO A PRIMARY ECONOMIC DRIVER FOR THE REGION BY 2022.

GOAL 5: DEVELOP RECREATIONAL FACILITIES & OPPORTUNITIES TO BETTER SERVE LOCAL RESIDENTS & EMPLOYEES & ATTRACT PROSPECTIVE VISITORS & RESIDENTS.

FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

GOAL 1: BUILD AN ENTREPRENEURSHIP CULTURE WITHIN THE REGION BY 2020.

GOAL 2: INCREASE ACCESS TO FUNDING FOR ENTREPRENEURIAL & EASTERN SHORE SMALL BUSINESS EFFORTS TO IMPROVE OUR ECONOMY.

GOAL 3: INCREASE MARKET & VALUE-ADD OPPORTUNITIES FOR EASTERN SHORE PRODUCTS & PROVIDERS.

GOAL 4: DEVELOP AFFORDABLE & RELIABLE INFRASTRUCTURE TO FACILITATE EASTERN SHORE BUSINESSES.

REGIONAL ECONOMIC DEVELOPMENT PLAN

The Eastern Shore regional economic development plan is evidence-based, relevant to the region, and realistic. The plan engages every resource in the supporting communities and relies on collaboration to leverage vital support and reduce duplication in developing economic initiatives. Community capitals on which strong economies are built are incorporated into the strategies capitalizing on the built infrastructure, the political will, the natural and cultural assets, social and human resources, and the financial options.

The four clusters on which this plan is constructed are summarized in the following snapshots with fully developed plans of work included in **Appendix C, D, E, and F**. Additionally, a compilation of goals and objectives successfully completed from recent economic development initiatives is included in **Appendix G**.



AEROSPACE & DEFENSE ACTION PLAN SNAPSHOT

Industry Statistics

Defense & Security is an emerging cluster, suggesting that it has growth potential in the Eastern Shore (*Purdue*). In 2013, Defense & Security was the regional requirement with the third largest dollar amount, suggesting it is a significant economic force in the Eastern Shore. However, the region satisfied a very small percentage of its Defense & Security requirements, suggesting high leakages in this growing cluster (*Purdue*).

Leakages at Wallops may be less pronounced than in the Defense & Security cluster, but opportunities for improvement still exist. For example, in 2011, 20% of Wallops' economic impact occurred within Accomack County, 48% occurred in the Lower Eastern Shore (Accomack, Northampton, and 3 Maryland Counties), and 52% occurred outside of the region (*Wallops Island BEACON study, 2011*).

Labor/Workforce Statistics

NASA is the eighth largest employer in the region (*Virginia LMI*). Between 2009 and 2014, there was a 3% increase in STEM jobs in the Eastern Shore (*Purdue*). In addition, atmospheric and space scientists are a growth occupation in Virginia, with a projected 49% increase between 2012 and 2022, and an average salary of \$103,871 (*Virginia LMI*).

The average weekly wage for Professional, Scientific, and Technical Services employees (the broad category into which many Aerospace & Defense jobs fall) during April-June 2015 was \$1,173, the 4th largest of the occupations evaluated (*Virginia LMI*). Employment in Professional, Scientific, and Technical Services is projected to increase 31% in Virginia from 2012-2022 and 3% from 2014-2016 (*Virginia LMI*).

The Eastern Shore has a higher rate of high school completion, college attendance, and graduate degree attainment than Rural Virginia as a whole. However, within the current labor force, the Eastern Shore has a higher rate of less than high school attainment, a lower rate of college attendance/associate's degree attainment, and a lower rate of college degree attainment than Rural Virginia as a whole (*Purdue*). This may justify developing an education-related plan to help Eastern Shore residents qualify

for Aerospace & Defense jobs, as a higher proportion of Professional, Scientific and Technical Services occupations require at least a college degree (BLS). In addition, the high-paying manufacturing jobs that Unmanned Aerial Systems are projected to create will likely require technical baccalaureate degrees (AUVSI Economic Report, 2013).

Wallops’ Competitive Advantage

Wallops is located in one of the nation’s most strategic concentrations of military and aerospace industrial activities. This location is strategic for both the Department of Defense (DOD) and NASA, due to its proximity to restricted military and special-use airspaces over the Atlantic and in the Virginia Beach area (SU Symposium, Wallops Complex Regional Economic Development Opportunities). Actually, 63 miles of Atlantic coastline around Wallops is federally owned or preservation property, which frees Wallops from the encroachment concerns that face the nation’s two other major launch ranges (SU Symposium, Wallops Complex Regional Economic Development Opportunities).

Wallops includes NASA’s only launch range, which primarily supports NASA’s science and technology efforts but also supports the DOD and commercial industry (SU Symposium, Wallops Complex Regional Economic Development Opportunities). In addition, the Mid-Atlantic Regional Spaceport (MARS), located at Wallops, is one of only four space lift launch range capabilities in the nation. MARS is being targeted for new government and commercial missions (SU Symposium, Wallops Complex Regional Economic Development Opportunities).

Orbital Sciences, one of two companies NASA sources to provide payloads to the International Space Station, is located at Wallops (Project Narrative: Optimizing Wallops Research Park Build-Out). In early 2016, NASA awarded a new eight-year contract to Orbital, which includes at least six cargo missions valued at \$1.2-\$1.5 billion, beginning in 2019 (NASA).

Wallops’ MARS launch capabilities, R&D resources, NASA runway access, and payload processing facility create unique assets and infrastructure advantages that could benefit space launch, earth science missions, and Advanced Exploration Systems (AES) testing (SU Symposium, Wallops Complex Regional Economic Development Opportunities). Furthermore, the Mid-Atlantic Aviation Partnership (MAAP) is one of six test sites the FAA selected to verify Unmanned Aerial Systems (UAS) airworthiness and advance UAS commercialization (Project Narrative: Optimizing Wallops Research Park Build-Out).

Table 4.3: Top 10 Beneficiaries of the Aerospace Industry, 2009 (Indirect Impact)

	Employment
Management of companies and enterprises	1,054
Wholesale trade businesses	517
Employment services	434
Scientific research and development services	291
Architectural, engineering, and related services	284
Computer systems design services	275
Business support services	211
Telecommunications	185
Food services and drinking places	176
Real estate establishments	169
Total Top 10 Industries	3,596
Total Indirect Impact	8,934
Source: IMPLAN 2008	

Economic Potential

The impact of UAS on Virginia is projected to be more than \$2.7 billion between 2015 and 2025, creating more than 3,500 jobs and producing \$26.8 million in tax revenue during the same timeframe. Nationally, 34,000 high-paying manufacturing jobs and more than 70,000 new jobs are projected to be created between 2015 and 2017, of which Virginia is expected to have a

Source: Virginia’s Aerospace Industry: An Economic Impact Analysis (January, 2011)

3.55% share, which is the 7th highest of any state in the nation (AUVSI Economic Report, 2013).

Virginia ranks as the state projected to receive the eighth most gains in terms of job creation and additional revenue from UAS (AUVSI Economic Report, 2013).

Regarding Commercial Space Ports: “This is one of the few times I’ve seen a nascent industry birthed in such a way that Virginia could not be poised better to take advantage of it – if we get it right.”
 – Virginia Secretary of Technology Karen R. Jackson, 10/2/14

Wallops’ Regional Benefits

Wallops’ projected regional economic impact in 2013 was \$188 million. This included 1,488 employees between NASA, NAVY and NOAA, and an additional 2,341 local jobs supported. Wallops also had a \$2.4 million impact on tourism (SU Symposium, Wallops Complex Regional Economic Development Opportunities). With full build-out, Wallops’ projected economic impact is 6,558 jobs, which would be a 42% increase from 2013 estimates (Project Narrative: Optimizing Wallops Research Park Build-Out).

Table 4.4: Top 10 Beneficiaries of the Aerospace Industry, 2009 (Induced Impact)	
	Employment
Food services and drinking places	679
Offices of physicians, dentists, and other health practitioners	579
Private hospitals	425
Real estate establishments	376
Wholesale trade businesses	324
Retail Stores - General merchandise	257
Retail Stores - Food and beverage	232
Nursing and residential care facilities	230
Retail Stores - Motor vehicle and parts	221
Private household operations	149
Total Top 10 Industries	3,472

Source: Virginia’s Aerospace Industry: An Economic Impact Analysis (January, 2011)

The Eastern Shore region will capitalize on its aerospace and defense industry with the full support of the Wallops leadership and its regional partners.

AEROSPACE & DEFENSE ACTION PLAN SNAPSHOT		
Goal 1: Grow Wallops Complex	Goal 2: Increase Unmanned Systems (UMS) Operations	Goal 3: Increase Coastal Research & Resilience
<u>Objective A:</u> Create a Dedicated Marketing Function to Promote the Wallops Complex & Eastern Shore of Virginia Capabilities	<u>Objective A:</u> Develop Partnerships to Maximize UMS Systems Capabilities	<u>Objective A:</u> Deploy a Network Oceanographic Sensors
<u>Objective B:</u> Develop Additional Technical, Industrial, & Office Space in the Wallops Research Park	<u>Objective B:</u> Attract Commercial UMS Tenant Companies	<u>Objective B:</u> Demonstrate UMS for Data Collection
<u>Objective C:</u> Create Financing Opportunities & Business Incentives to Grow Launch Operations		<u>Objective C:</u> Market the Region as a Testbed for Conducting UMS-based Coastal Research
<u>Objective D:</u> Attract Additional Space Launch Programs & Missions		
<u>Objective E:</u> Develop Workforce Development & Continuing Education Presence in Wallops Research Park		
<u>Objective E:</u> Develop Foundational Support Infrastructure to Support Wallops Complex Growth		<u>Objective D:</u> Implement Adaptive Management Practices

AGRIBUSINESS & FOOD PROCESSING ACTION PLAN SNAPSHOT

Evidence indicated that the Agribusiness and Food Processing cluster is clearly a mature cluster with employment declining from 3,295 to 1,017 jobs representing a 69.1% decrease. However, the region has valued the land and those that farm this land for hundreds of years. Discussions of economic growth highlighted multiple options for transitioning this mature cluster into the star category.

The Eastern Shore hosts 373 farms with over 133,000 acres of land considered farmland. Between 1970 and 2014, the net income including corporate farms grew from \$18.0 million to \$36.9 million representing a 104.9% increase. During that same timeframe, cash receipts from livestock and products grew from \$47.5 million to \$156.7 million resulting in a 229.8% increase. However, the cash receipts from crops shrank over 30.9% from \$155.6 million to \$107.5 million (**Appendix H**). A Weldon Cooper Center study reported an estimated regional economic impact of nearly \$1.5 billion in 2015 for the Eastern Shore of Virginia's agriculture industry. The region's top two employers, Perdue and Tyson, and 11 of the top 50 regional employers are directly linked to the agribusiness and food processing cluster.

Value of forestry production has increased in the region since 2013 and continues to offer opportunities for growth through value-added processing. The Weldon Cooper Center estimated a regional economic impact of \$12.4 million generated from the forestry industry during 2015.

Virginia aquaculture farmers include 33 hard clam producers with 2013 sales totaling \$20.8 million. These growers produced 32% of total United States hard clam production in 2013 and is ranked number 1 in the United States. Hard clam is the second most valuable crop raised on the Eastern Shore exceeding for example, the values for corn, soybeans, and wheat. In 2012, 516 million seed clams were planted and 171 million market clams were sold at a value of \$26.8 million from Virginia's Eastern Shore farms. Additionally, 86% of clams sold in 2012 went to out-of-state buyers representing a source of economic growth on the Eastern Shore and throughout the Commonwealth. A study conducted by economists from George Mason University estimates that economic activity associated with the aquaculture industries on the Eastern Shore of Virginia was estimated to be \$156.7 million during 2016, adding an additional value of \$114.4 million to the Eastern Shore's gross regional product. This sector of the agribusiness and food processing cluster supports 170 full-time and 75 part-time jobs.

In 2014, the average annual wages in crop production were \$26,040 and \$40,528 in animal production.

AGRIBUSINESS & FOOD PROCESSING ACTION PLAN SNAPSHOT			
Goal 1: Develop a Value-Added Fresh Food Marketing Cooperative	Goal 2: Develop a Wholesale Production for Larger-Scale Farmers	Goal 3: Develop a Pine Sawmill	Goal 4: Agribusiness & Food Processing Workforce Development
<u>Objective A:</u> Assess Regional Production Capacity with a Small Farmer Focus	<u>Objective A:</u> Research Priority Crop Production	<u>Objective A:</u> Complete Economic Impact Educational Campaign from Timber Manufacturing	<u>Objective A:</u> Establish Agricultural Education & Training Programs
<u>Objective B:</u> Assess the Potential for Specific Farm & Farmer’s Markets	<u>Objective B:</u> Assess & Address Agribusiness Infrastructure Needs	<u>Objective B:</u> Obtain Funding for Forest Inventory & Pine Sawmill Marketing Plan	<u>Objective B:</u> Prepare Skilled Labor Force Within Specific Industries: Nursery, Vegetable, Aquaculture, & Grain Crops
<u>Objective C:</u> Evaluate & Enhance Existing Agribusiness Infrastructure		<u>Objective C:</u> Develop Forest Inventory & Pine Sawmill Marketing Plan	
<u>Objective D:</u> Research & Promote Production Opportunities		<u>Objective D:</u> Attract Forestry Sector Operations	
<u>Objective E:</u> Encourage Participation in a Buy Fresh, Buy Local Chapter			

ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES ACTION PLAN SNAPSHOT

The Arts, Entertainment, and Recreation industry received a Star Cluster rating from the Purdue Center for Regional Development. This rating is applied to industry clusters that are strong, concentrated, and growing. In addition, the industry has a location quotient of 1, which indicates the proportion of employment in the tourism industry is equal to the national tourism employment concentration. From 2009-2014 both the Arts, Entertainment, and Recreation and Retail Trade industries have grown, 25% and 10% respectively.

Virginia Labor Market Information on the Eastern Shore indicates that long-term employment growth from 2012-2022 in Retail Trade (9%); Arts, Entertainment, and Recreation (16%); and Accommodation and Food Services (13%) industries. Currently, average weekly wage in these industries are \$382, \$403, and \$265, respectively.

The Virginia Tourism Corporation (VATC) offered the following support for the Eastern Shore tourism industry:

- The Eastern Shore is Virginia’s fastest growing tourism region in all key metrics:
 - #1 in total tourism expenditures growth: 4.8%
 - #1 in payroll growth: 7.1%
 - #1 in employment growth: 4.2%

- #1 in state tax receipt growth: 6.7%
- #1 in local tax receipt growth: 7.2%
- Visitor spending totaled \$245 million in 2014
- Visitors paid \$6.6 million in taxes through lodging, meals, and sales tax
- From 2009-2014 visitor spending on the Eastern Shore increased 22%
- In 2014, \$1.8 million was collected in lodging taxes, a 43% increase from 2009
- More than 3,000 tourism guides were requested in 2015

The VATC Economic Impact Report (<https://www.vatc.org/research/economicimpact/>) indicated:

- Retail shopping is one of the major activities of people traveling in Virginia. In 2014, domestic travelers spent \$2.1 billion on purchases at retail stores. Retail shopping accounted for 9.2 percent of domestic travelers' trip spending in Virginia.
- The 216,900 jobs supported by domestic travel in Virginia comprised 7.1 percent of the state's total private employment during 2014.
- 20.2% of Virginia tax revenue from tourism went to local government tax
- Domestic travelers spent \$180.68 million in Accomack in 2014
- Domestic travelers spent \$73.75 million in Northampton in 2014
- Tourism routes/trails spread visitor activity across the region, reducing negative environmental impacts, facilitating the management capacity of the tourism destination, and dispersing the economic benefits more widely. Artisans Center of Virginia <http://www.artisanscenterofvirginia.org/>
- Research, based on similar trails in western North Carolina, has shown that 97% of travelers make a purchase somewhere along the trail, artisan studios & farms have shown an increase of 23% in sales and craft shops and galleries reported a 28% increase in revenue.

The Purdue News published an article, "*Want tourists in your town? Brand it, and they will come*" (<http://www.purdue.edu/uns/html4ever/0009.Cai.natbranding.html>). The article indicated that "creating a 'destination mix' is necessary to attract visitors and ensure that travel amenities are readily available. The destination mix must include: 1) Natural and cultural attractions 2) Infrastructure 3) Lodging facilities 4) Transportation 5) Hospitality training. In addition to the five tourism components, entrepreneurship opportunities must be built on government support and business collaboration (*Factors for Success in Rural Tourism Development*, Wilson, et. al, 2001).

The Eastern Shore understands that for successful tourism development the region must ensure: "(1) a complete tourism package, (2) good community leadership, (3) support and participation of local government, (4) sufficient funds for tourism development, (5) strategic planning, (6) coordination and cooperation between businesspersons and local leadership, (7) coordination and cooperation between rural tourism entrepreneurs, (8) information and technical assistance for tourism development and promotion, (9) good convention and visitors bureaus, and (10) widespread community support for tourism" (*Wilson*).

The region's unique identity can directly be attributed to its ability to retain its natural beauty, relatively pristine natural environments and ecosystems, and its vast expansive opportunities for outdoor recreation. A 2017 study of the economic impacts of conservation lands indicated that there approximately 33 percent of the land in the region is conserved with an additional 10 percent held in conservation easements. It was reported that the economic activity associated with organizations involved in land conservation was nearly \$22 million, with contributed \$355,000 via local taxes, \$329,000 in state taxes, and 226 jobs in the region during 2016. The Eastern Shore's exemplary network of conserved lands also contributes to excellent water quality which supports the burgeoning

aquaculture industry. It was estimated that economic activity associated with the regional aquaculture industries is estimated to be \$156.7 million in 2016, adding an additional value of \$114.4 million to the Eastern Shore of Virginia’s gross regional product. Further, the economic activity associated with visitor spending in Accomack and Northampton Counties was estimated to be \$51.38 million in 2016, adding an additional value of \$26.35 million to the gross regional product.

Committed to growing the Arts, Entertainment, Recreation, and Visitor industry, the Eastern Shore has developed an ambitious plan of work to achieve this effort.

ARTS, ENTERTAINMENT, RECREATION, & VISITOR INDUSTRIES ACTION PLAN SNAPSHOT				
Goal 1: Develop the Region as a well-managed Tourism Destination	Goal 2: Create Hospitality Ambassadorship, Mentorship, & Internship Programs	Goal 3: Enhance Local Government Support for Tourism	Goal 4: Grow Arts Industry into Primary Economic Driver	Goal 5: Develop Recreational Facilities & Opportunities
<u>Objective A:</u> Promote Tourism Development, Events & Opportunities	<u>Objective A:</u> Establish Tourism Certification Programs	<u>Objective A:</u> Inform Local Officials, Public Service Employees, and NGO Boards of Tourism Economic Impact	<u>Objective A:</u> Drive Scalable Artisan Business Growth	<u>Objective A:</u> Develop Regional Network of Pedestrian Facilities
<u>Objective B:</u> Establish ESVA Brand as a Highly-recognized & Utilized Promotion Tool	<u>Objective B:</u> Increase Understanding of Value of Tourism Industry	<u>Objective B:</u> Increase Generated Revenue to Support Tourism Commission for Development & Marketing	<u>Objective B:</u> Establish Regional Program Providing Opportunities for Artisans and Artists	<u>Objective B:</u> Increase Recreational Non-Motorized Boat Use

FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT ACTION PLAN SNAPSHOT

Clusters require not just geographic proximity to thrive but also a culture that favors innovation, provides support for the business networks of the region, and has the capacity to put to use the ‘knowledge spillover’ geographic proximity creates. In addition, cluster development needs coordinated, informed, and involved institutions to help spur innovation and growth.

“In other words, successful innovation and related economic development mostly occur regionally (Amin and Thrift, 1994; Scott, 1996; Storper, 1997; Cooke et al., 1997; Rigby, 2000) where systematic and repeated interactions between relevant local actors encouraged by a favourable institutional framework both shape the innovative capacity of specific regional contexts and allow absorbing and employing exogenously produced knowledge in an economically productive way (Iammarino, 2005, p.499), as highlighted by the (regional) system of innovation literature (Lundvall, 1992; Cooke et al. 1997). Local economic development may be

encouraged by the realization of a regional competitive advantage based on location-specific and specialised capabilities and competencies nurtured by socio-institutional and cultural structures. Since such conditions are context-specific, they are extremely difficult to replicate in different settings and each location has to shape its own competitive advantage on the basis of functional and effective interactions between local economic agents and socio-institutional forces.” (p. 8)

Source: Regional Economic Development: A Review, by Andrea Ascani, Riccardo Crescenzi, and Simona Iammarino (2012). <http://www.ub.edu/searchproject/wp-content/uploads/2012/02/WP-1.3.pdf>

Regions, Globalization, Development by Allen J. Scott and Michael Storper (2003)

FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT ACTION PLAN SNAPSHOT			
Goal 1: Build a Regional Entrepreneurship Culture	Goal 2: Increase Funding Access for Local Small Business Efforts	Goal 3: Increase Market & Value-add Opportunities for Eastern Shore Products & Providers	Goal 4: Develop Affordable & Reliable Infrastructure to Facilitate Local Businesses
<u>Objective A:</u> Create a Regional Economic Think Tank	<u>Objective A:</u> Develop Financing Sources to Support Regional Economic Development Plan Goals	<u>Objective A:</u> Create an Attractive & Compelling Convention Center & Market Location for Sales of Eastern Shore Products on Route 13.	<u>Objective A:</u> Expand Broadband (20 MB & Down) Availability to All Businesses & Vast Majority of Residences
<u>Objective B:</u> Expand Awareness of Entrepreneurship Opportunities to Increase Successful Startups	<u>Objective B:</u> Attract Companies, Particularly Small and Start-up, to the Region via Incentives & Credits to Make the Region More Attractive		<u>Objective B:</u> Plan Future Business Development in Conjunction with Existing Water & Sewage Facilities
<u>Objective C:</u> Create an Incubator for New Businesses			<u>Objective C:</u> Provide Reliable, Cost-Effective “Smart” Power from both Renewable & Traditional Sources
			<u>Objective D:</u> Ensure Adequate & Reliable Transportation Infrastructure for Local Businesses

EVALUATION FRAMEWORK

The evaluation framework serves as a mechanism to gauge progress on the successful implementation of the Economic Development Plan while providing information annually as required by EDA and the USDA. Performance measures. The measures selected were prioritized based upon what was identified to be important to the region, what conditions the region needs to reverse or create, and what regional assets can be leveraged. Further, the measurements were a required criteria for any goal, objective, or strategy that was proposed to be included in the plan.

KEY MEASURES AND STRATEGIES TO TRACK PROGRESS:

Each goal measurement will be used to track progress including tracking outcomes resulting from specific goals, surveys, and monitoring industry trends.

To keep the plan up to date and relevant and to ensure that regional stakeholders continue to be invested in the implementation of the action plans, the Accomack-Northampton Economic Development Committee has assumed the role of responsible entity for the plan. The Committee has updated its by-laws and created standing subcommittees focusing on the four industry sectors that will meet bi-annually to review, update, and discuss existing strategies and within the action plans and formulate additional evidence-based opportunities for potential inclusion in the regional action plans. Newly formulated projects or strategies developed at the subcommittee level will be proposed to the Committee for consideration and the Committee will ultimately decide which projects are appropriate for inclusion in the Regional Economic Development Plan. Subcommittee meetings are open to the public, generally follow an informal meeting structure, and are to be coordinated by A-NPDC staff.

There are numerous avenues for members of the community to become involved in the work of the plan. In addition to membership on the Planning District Commission or the Economic Development Committee, community members can stay informed via updates and news related to the plan via the A-NPDC Economic e-Newsletter or on the A-NPDC website (www.a-npdc.org) and Facebook page. Anyone interested in the project can also contact the A-NPDC Planning Department directly by calling (757) 787-2936.

REGIONAL ECONOMIC DEVELOPMENT MEASUREMENT PLAN

AEROSPACE & DEFENSE

- Increased county tax revenue (Source: Accomack County)
- Increase in number of tenants in Wallops Research Park (Source: Wallops Research Park, Accomack County)
- Number of vendor tours (Source: NASA, Wallops Research Park)
- Number of presentations to STEM departments and workshops (Source: Wallops Island Regional Alliance, Virginia Space)
- Number of requests for facility from Fixed Base Operators (Source: Accomack County)
- Number of new businesses to demonstrate at NASA Wallops and to relocate to region permanently (Source: NASA Wallops, Accomack and Northampton Counties, Chambers of Commerce)
- Increase in amount of research money spent in region (Source: NASA Wallops, Accomack-Northampton Planning District Commission)
- Number of sensors and instruments in the onshore, offshore, and nearshore environment (Source: NASA Wallops)
- Number of UMS flight and/or underwater hours (Source: NASA Wallops)

AGRIBUSINESS & FOOD PROCESSING

- Number of small-farmer growers and current production numbers (Source: USDA/FSA, Virginia Department of Agriculture & Consumer Services)
- Increase in number of farmer's markets in region (Source: Virginia Department of Agriculture & Consumer Services)
- Number of members participating in a buy fresh, buy local chapter (Source: Virginia Cooperative Extension, Virginia Tech)
- Number of potential benefactors of wholesale production facility (Source: USDA, Virginia Department of Agriculture & Consumer Services)
- Production data for all vegetable, grain, fiber, and oilseed crops and aquaculture in region (Source: USDA, Virginia Department of Agriculture & Consumer Services, Virginia Institute of Marine Science)
- Number of commitments from produce brokers to sell Eastern Shore produce (Source: USDA, Virginia Department of Agriculture & Consumer Services)
- Identified number of potential priority commodities (Source: USDA, Virginia Department of Agriculture & Consumer Services, Virginia Cooperative Extension, Virginia Tech)
- Increase number of sawmill companies operating in region (Source: Virginia Department of Agriculture & Consumer Services, Chambers of Commerce)
- Increase number of students in region completing agricultural education and training programs (Source: Accomack & Northampton County Public Schools, Eastern Shore Community College)
- Number of individuals completing skilled labor training within specific industries including nurseries, vegetables, aquaculture, and grain crops (Source: Eastern Shore Community College, Virginia Cooperative Extension)

ARTS, ENTERTAINMENT, RECREATION, & VISITOR INDUSTRIES

- Increase in consumer spending attributed to tourism (Source: Virginia Tourism Corporation).
- Increase in tax revenues (Source: Accomack & Northampton Counties).
- Revenue generated for ESVA Tourism Commission to fund tourism initiatives (Source: ESVA Tourism Commission).
- Number of tourist exploring the Artisan and Oyster Trails as reported by related businesses (Source: Chambers of Commerce).
- Percentage of retail shops on the Eastern Shore selling locally made products from artisans or food producers (Source: Chambers of Commerce).
- Number of regional tourism businesses using the Eastern Shore brand (Source: Chambers of Commerce).
- Percentage of trained tourism frontline workers (Source: Chambers of Commerce).
- Increased understanding and awareness by regional residents and governing bodies of tourism economic impact and value (Source: ESVA Tourism Commission).

FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

- Number of outreach and educational opportunities to increase successful startup businesses (Source: Eastern Shore Community College, Chambers of Commerce)
- Increase number of business opportunities created through the development of a business incubator (Source: Accomack-Northampton Planning District Commission, Chambers of Commerce)
- Number of new small and startup business attracted via new incentive and credit programs (Source: Chambers of Commerce)
- Number of opportunities made available through the creation of a regional market location for sales of Eastern Shore products (Source: Accomack-Northampton Planning District Commission)
- Percentage of broadband availability to businesses and residences (Source: Eastern Shore of Virginia Broadband Authority)
- Number of new businesses developed as result of marketing existing water and sewage facilities (Source; Chambers of Commerce, Accomack & Northampton Counties, Towns with existing water and sewer services)
- Number of new or expanded renewable and traditional power sources (Source: Accomack-Northampton Electric Cooperative)

ECONOMIC RESILIENCE

The Eastern Shore of Virginia’s economic prosperity is linked to the region’s ability to prevent, withstand, and quickly recover from major disruptions to its economic base. Economic resilience may be characterized as including the following three primary attributes:

- The ability to recover quickly from shock,
- The ability to withstand a shock, and
- The ability to avoid the shock altogether.

Establishing a culture of economic resilience in local and regional economies requires the ability to anticipate risk, evaluate how that risk can impact key economic assets, and build a responsive capacity. The shocks/disruptions to the economic base are often apparent in the following ways:

- National or international downturns or other significant events which impact demand for locally produced goods and consumer spending;
- Downturns in specific industries that constitute a critical component of the region’s economic activity; and/or
- Other external shocks such as natural or man-made disasters, government shutdowns, , the impacts of long-term phenomena such as sea-level rise or climate change, exit of a major employer, etc.

The following items were identified as potential incidences that have and/or continue to put the Eastern Shore’s regional economy at risk (listed in no particular order):

- Natural and Man-Made Hazards
- Government Shutdowns
- Geographic Isolation
- Out-Migration of Residents
- Aging Demographics
- Overall State of Economy
- Stability of Largest Employers
- Healthcare
- Biological Diseases (i.e. avian flu, fish kills, etc.)
- Transportation Infrastructure Closures (bridges, roads, navigable channels, port closures from meteorological, climate, construction, and traffic events)

Building the capacity for economic resilience on the Eastern Shore of Virginia must be a primary objective of economic development practitioners in order to be successful. In doing so, it is critical that individuals and organizations consider their role in the pre- and post-incident environment to include both steady-state and responsive initiatives.

Steady-state initiatives may be characterized as long-term efforts that seek to bolster the region or community’s ability to withstand or avoid a shock. Current and ongoing steady-state economic resilience initiatives employed on the Eastern Shore are described in the following table:

EASTERN SHORE OF VIRGINIA STEADY-STATE ECONOMIC RESILIENCE INITIATIVES			
Steady-State Initiative	Responsible Entity	Description	Shock/Disruption Type
Regional Hazard Mitigation Plan	Accomack-Northampton Planning District Commission (A-NPDC)	Identifies and works to implement mitigation strategies for high-priority natural hazards: coastal flooding, stormwater flooding, coastal erosion, and high winds	Natural Hazards
Virginia's Eastern Shore Coastal Resilience Tool Project Site Mapping Portal	The Nature Conservancy, A-NPDC, Climate Adaptation Working Group Partners	Customized tool for identifying vulnerabilities to storm surge, sea-level rise, and coastal habitat change. Includes economic vulnerability assessment tool.	Natural Hazards
Transportation Infrastructure Inundation Vulnerability Assessment	A-NPDC, Transportation Technical Advisory Committee, Climate Adaptation Working Group	2015 regional study identifying transportation infrastructure vulnerability to sea-level rise. Considers connectivity and accessibility limitations to communities and critical facilities.	Natural Hazards
Working Waterfronts Initiative (VA WWF Master Plan)	A-NPDC	Initiative to preserve and enhance working waterfront facilities through mitigation of identified threats and policy/regulation development.	Natural Hazards; Out-Migration; Aging Demographics
Regional Navigable Waterways Committee (Needs Assessment)	A-NPDC	Initiative to implement dredging projects in local waterways to maintain navigable channels	Natural Hazards
Ground Water Committee (Management Plan)	A-NPDC	Partnership to ensure adequate water supply and quality of region's sole source aquifer system	Natural Hazards, Natural Resource Management
Workforce Development Program	Eastern Shore Community College	Program developing training programs to address regional workforce needs	Out-Migration; Aging Demographic
Community Partners of the Eastern Shore	Eastern Shore Community Services Board, A-NPDC	Regional initiative dedicated to addressing the needs of citizens facing difficulties.	Health and Well-Being
Healthy Communities Initiative	Eastern Shore Healthy Communities Coalition partners	Initiative to improve health and wellness of citizens.	Health and Well-Being

Responsive economic resilience initiatives may be characterized as shorter and immediate-term efforts which can include establishing capabilities for the region to be responsive to recovery needs following an incident. Current and ongoing responsive economic resilience initiatives employed on the Eastern Shore are described in the following table:

<i>EASTERN SHORE OF VIRGINIA RESPONSIVE ECONOMIC RESILIENCE INITIATIVES</i>			
<i>Steady-State Initiative</i>	<i>Responsible Entity</i>	<i>Description</i>	<i>Shock/Disruption Type</i>
Disaster Preparedness	Eastern Shore of Virginia Disaster Preparedness Coalition	Regional partnership to maximize regional capacity to respond to significant natural and man-made disasters	Natural and Man-made Hazards
<u>Regional Hazard Mitigation Plan</u>	Accomack-Northampton Planning District Commission (A-NPDC)	Identifies and works to implement mitigation strategies for high-priority natural hazards: coastal flooding, stormwater flooding, coastal erosion, and high winds	Natural Hazards
Delmarva Hazardous Spill Response	US Coast Guard; Coastal Management Entities	2011 Planning initiative to establish response protocol for large-scale hazardous spill incidents	Man-made Hazards
Delmarva Poultry Disease Task Force	Virginia Department of Health - Eastern Shore Health District	Emergency response preparedness and environmental health initiative	Natural and Man-made Hazards

REGIONAL ECONOMIC RESILIENCE GOALS

As a region with a history of experiencing economic shocks and disruptions, the Eastern Shore of Virginia has a sound understanding of how its industries and citizens are vulnerable to such incidences. The region’s most mature industries are generally connected to the region’s excellent natural resources (i.e. agribusiness, etc.), which have experienced significant impacts from natural hazard and economic downturns. In recent years, the region has enhanced its overall economic resilience by diversifying its industrial base to include a broader variety of industry types including significant growth in the ecotourism and aerospace and defense sectors. Additionally, the agribusiness sector itself has evolved in a manner that has made it more economically resilient. For example, agriculture has expanded to include a growing number of small farm operators and aquaculture has shifted from predominantly single-harvesters to larger commercial operations. While these changes have resulted in some improvements to the region’s overall economic resilience, a number of vulnerabilities remain requiring a host of both steady-state and responsive initiatives.

Many of the outlying needs have been included as objectives in the action plans. Examples of this include, the Aerospace & Defense sector’s goal to enhance coastal resilience to storms, sea-level rise, and other natural phenomena and the Arts, Entertainment, Recreation, and Visitor Industry sector’s goals and objectives to inform elected officials and address financing needs to enhance their capacity to achieve their objectives. However, the Economic Development Committee feels additional objectives and strategies are necessary to more adequately address the region’s overall economic resilience and plans to continue to work towards making progress by encouraging the four standing subcommittees to address their sector-specific economic resilience vulnerabilities through the continued development of steady-state and responsive goals, objectives, and strategies.

APPENDICES

APPENDIX A: ACCOMACK-NORTHAMPTON ECONOMIC DEVELOPMENT COMMITTEE MEMBERS AND STAFF

<i>Voting Members</i>	
REPRESENTATION	MEMBER (AFFILIATION)
A-NPDC (Accomack)	Hon. Donald Hart (A-NPDC)
A-NPDC (Northampton)	Butch Bailey (A-NPDC)
A-NPDC (Chincoteague)	Hon. Arthur Leonard (A-NPDC)
Acc. Co. Economic Development Authority	Wesley Edwards (Acc. Co. EDA)
North. Co. Joint Industrial Development Authority	John Pavlik (North. Co. JIDA)
NASA Wallops Flight Facility	Caroline Massey (NASA)
Wallops Island Regional Alliance	Peter Bale (Sentinel Robotic Solutions)
ES Community College	Dr. Linda Glover (ESCC)
Ag. & Food Processing Sector	Dr. Richard Snyder (VIMS)
Arts, Entertainment, Recreation, & Visitor Industries Sector	Evelyn Shotwell (Chincoteague Chamber of Commerce)
Found. & Entrepreneurship Development Sector	Ron Matthews (Matthews & Company, CPAs)
Private Sector 1 (Accomack)	Andy Mason (Weichert, Realtors Mason-Davis)
Private Sector 2 (Accomack)	Kevin Dennis (Perdue Farms)
Private Sector 3 (Accomack)	Robie Marsh (ESVA Chamber of Commerce), Chairman
Private Sector 4 (Accomack)	Charlie Russell (WESR)
Private Sector 5 (Accomack)	Kevin Taylor (Tyson Foods)
Private Sector 6 (Accomack)	Joseph Betit (Tech Entrepreneur)
Private Sector 7 (Accomack)	Fitz Godwin (ES Public Library Foundation)
Private Sector 8 (Accomack)	David Lumgair (Luminary Air Group)
Private Sector 9 (Accomack)	Dr. Mark Reiter (Virginia Tech)
Private Sector 10 (Northampton)	John Chandler (Bayshore Concrete Products)
Private Sector 11 (Northampton)	Ava Gabrielle-Wise (New Road Community Development)
Private Sector 12 (Northampton)	Sara Baldwin (New Ravenna), Vice Chair
Private Sector 13 (Northampton)	Sue Anglim (Eastern Shore Communications)
Private Sector 14 (Chincoteague)	Tommy Clark (Tom's Cove Aquafarms)
<i>Non-Voting Technical Advisors</i>	
County Admin. (Accomack)	Mike Mason (Acc. Co.)
County Admin. (Northampton)	Charles Kolakowski (North. Co.)
Executive Director (A-NPDC)	Elaine Meil (A-NPDC), Secretary
Delegate (VA General Assembly)	Hon. Rob Bloxom (VA General Assembly)
Senator (VA General Assembly)	Hon. Lynwood Lewis (VA General Assembly)
<i>Staff</i>	
Curtis Smith (A-NPDC)	

APPENDIX B: PUBLIC COMMENTS RECEIVED DURING 2017

Contact	Comment	Response	Action Taken
<p>Peggy Riley Quinby, VA (November 2017)</p>	<p>Thank you for inviting our comments on the Regional Economic Development Plan.</p> <p>When you read this, the last thing I wrote is most likely the most important. I read the invitation to send our comments to you by November 15th. I really have not had a chance to make sure this is written correctly, and I apologize but be assured this comes from a person who is passionate about the Eastern Shore. We have lived in Austin, Texas, and at the base of Mt. Hood in Oregon, Pennsylvania, Tennessee, and various places around the commonwealth. My roots are here, and this is where I have come back to live. I would love to have a place for my grandchildren to live to make a decent living.</p> <p>This has to do with tourism: with reference to what I read about our waterways. It appeared tome that the emphasis was on kayaking. I saw many maps that had kayaking trails mostly up around Chincoteague. One I believe was from Quinby harbor to Wachapreague. And then down around Cape Charles.</p> <p>I did not see anything that would cause the sport fisherman to come here to fish or to want to move here.</p> <p>I don't believe in raising an issue without at least offering some way of fixing the problem. I would suggest our delegates work for us to change the regulations on the fish being caught: the size and the number. Also change the regulations on the commercial fishermen.</p> <p>Perhaps fishing a certain distance off shore. It is pretty frustrating when a man comes and sinks his nets beside you when you are fishing. This is happening on the seaside, but I don't know what happens on the bayside. Put together a group of fishermen who fish for fun and let them come up with what they believe to be fair.</p> <p>There was in the development plan the reference as to how to get the 3 million or so who travel up our shore to stop. For the fisherman traveling by, who would come back and pay for a motel room to fish for 2 fish??? Makes no sense.</p> <p>Who is going to buy a home here if there thing is fishing, and they can't fish. Our attraction is our remoteness, our waterways, beaches, and our way of life. The waterways need to be kept open not just for businesses primarily but for the enjoyment of the residents here and hopefully those coming here to live. We want people to come and live here.</p> <p>Which brings me to: There must be good paying jobs. We don't need just retirees. We have got to work on getting high paying jobs here. Not just manufacturing with low paying jobs. We keep some of our local college graduates I am sure, but most will live in other places where they can be paid well. People speak of our beautiful shore, yes, it is. It is the reason I live here, because I love it. But it is also not pretty. It is not pretty to me</p>	<p>The Economic Development Committee thanks Ms. Riley for providing written comments. There are multiple goals and objectives in the Plan related to Tourism and Recreation development. The Committee recommends that you contact Curt Smith of the Accomack-Northampton Planning District Commission to discuss your vision in greater detail and to learn how to get involved in the meetings of the Accomack-Northampton Economic Development Committee and its subcommittees.</p> <p>The Foundational & Entrepreneurship Development Subcommittee's primary</p>	<p>Comment forwarded to Chair of the Accomack-Northampton Economic Development Committee.</p> <p>Comment forwarded to Chair of the Accomack-</p>

APPENDIX B: PUBLIC COMMENTS RECEIVED DURING 2017

Contact	Comment	Response	Action Taken
	<p>to see the number of folks who are poor. And we don't make them richer by giving them a hand out or raising the minimum wage. We just do away with jobs and go to automation. We must work for them. It is called caring about people not just ourselves. It is not enough just to have a good food bank. I am thankful for the training provided by the community college. I know we will always have the poor with us, that is true. But let's get good companies in here, for those who want to raise their families here.</p> <p>How? Decide who you want here? Think big. Microsoft? An IT company? Then set up a task force to get them and sell the Eastern Shore to them. We have NASA but we need more than NASA.</p> <p>The beauty of our Shore lies in its remoteness yet accessibility to the big cities within a few hours of drive time, its waterways, both bayside and seaside, and its beaches, but we have too few.</p> <p>We need more public beaches. We have beaches north and south, but none mid-shore that are accessible by car. The reason for not having more public beaches, some might say, is that the ones on the lower end of the Shore are not being used enough to justify the need for more. The reason maybe that it is too far to drive. Most of the population center is in the middle of the shore, but there is no public beach near us. This would help homes sales, restaurants, and motels. I can never visualize this becoming another Va. Beach or Ocean City. How much land does the Nature Conservancy own and how much has been put into land trusts? And how much will continue to be held onto by family land owners?</p> <p>This is something I really don't have a suggestion for but our pristine barrier islands are another incredible asset. I grew up, almost, on Parramore. These are dearest memories of my childhood. To have them available to get to is another reason our waterways need to be continually dredged, and marked.</p> <p>The inlets need to be continually marked by the Coast Guard. There is water traffic that needs to be able to make its way into Wachapregue, Quinby, and Willis Wharf, without running aground. It may not be to support businesses, but boats need to be able to find safety from the weather. To say nothing of those who visit and locals who cannot use our waterways because of the threat of running aground not because they cannot get out of our harbors (thank you for having Quinby dredged!) but once they are out either the channel is not marked, or the inlets are not marked. We will obviously always be having shifting sands. But with work it can be kept up to date with movable buoys.</p> <p>As I read your proposals for development it wasn't that I was opposed to anything in particular. It was that I did not believe your vision is large enough.</p> <p>One last thought; and probably the most important thought;</p>	<p>goal is sustainable growth in line with the vision you have presented. The subcommittee meets twice annually and you are encouraged to become involved with their work.</p> <p>There are multiple goals and objectives in the Plan related to Tourism and Recreation development. The Committee recommends that you contact Curt Smith of the Accomack-Northampton Planning District Commission to discuss your vision in greater detail and to learn how to get involved in the meetings of the Arts, Entertainment, Recreation and Visitor Industries Subcommittee and the Foundational & Entrepreneurship Development Subcommittee</p>	<p>Northampton Economic Development Committee and members of the Foundational & Entrepreneurship Development Subcommittee.</p> <p>Comment forwarded to Chair of the Accomack-Northampton Economic Development Committee and members of the Arts, Entertainment, Recreation, and Visitor Industries Subcommittee and the Foundational & Entrepreneurship Development Subcommittee.</p>

APPENDIX B: PUBLIC COMMENTS RECEIVED DURING 2017

Contact	Comment	Response	Action Taken
	<p>By building your planning on tourism for economic growth you are promoting exactly what you don't want: another Ocean City or the Outer Banks. These economies are built on tourism. Which first of all is seasonal, causes jammed roads, even bikers etc. With an economy built on bringing a good company(s) here that will keep our own young families and bring in more, we will have a steady economy.</p> <p>I want to compare what I have observed over the last 3 years. I have lived near Williamsburg. It attracts retirees to live there and tourism. But you would be amazed at the number of homeless people in James City County because on the surface you see money. But the poor are very much present.</p> <p>By comparison, I visit our daughter and her family in Arlington. The city of Arlington itself is not built on tourism. Obviously we have the government that employs tons of people. These folks have high paying jobs. There are private sector companies available that will make other areas prosperous as well.</p> <p>And even with a large company coming here all the things I mentioned about the Eastern Shore and its assets are still true. Folks won't want to come live here unless they can play here as well and we have so much to enjoy playing. Notice where the large companies locate, I am just thinking of Microsoft for instance, the incredibly beautiful Pacific Northwest, with skiing and hiking available. People these days, our young in particular, are into the outdoors and that is what we have, that is so wonderful. Yes, retirees are great, but this is the place for the active millennial who like the outdoors. They are outside folks; they like to sit around a fire pit in the cold. They like to eat outside with a blanket over them. They come out of the city to sit by a view of the water with blankets around them. We don't want them to visit us and do this, but to live here. Guys, property values go up!! And they will give our small businesses income all year round. More good restaurants will be needed.</p> <p>Aquaculture is important. Agriculture is important, but not many are going to get rich off of selling at a farmer's market. That is nice for the retiree who is supplementing his income for fun. But no one is going to feed a family from that. How about spending your energy and time on getting good companies into this area?</p> <p>Revitalization is great. Just because a town looks better does not mean by any stretch of the imagination that people will visit, or buy property ,or set up business. Look at Exmore . We must have permanent people with good jobs to support anybody putting a business into the old Benjamin's (?) building. It is a pointless and wasteful use of money. I must acknowledge the building does look better.</p> <p>Thank you for asking for our input. I do feel so strongly about these things.</p>	<p>The Regional Economic Development Plan is intended to identify projects of regional importance that may result in the sharing of resources between local communities to accomplish common opportunities. With regards to tourism and economic growth surrounding tourism, this will be controlled almost in entirety by local zoning codes, which are not addressed in the Regional Economic Development Plans.</p> <p>The Agribusiness & Food Processing Action Plan includes goals and objectives that would provide opportunities for both large and small-scale farming.</p>	<p>Comment forwarded to Chair of the Accomack-Northampton Economic Development Committee.</p> <p>Comment forwarded to Chair of the Accomack-Northampton Economic Development Committee and members of the Agribusiness and Food Processing Subcommittee.</p>

APPENDIX C: EASTERN SHORE REGIONAL PLAN OF ACTION: AEROSPACE & DEFENSE

GOAL 1: Grow the Wallops Complex (NASA Wallops, Virginia Space, and Wallops Research Park) into the nation’s spaceport-of-choice for access to space for the platform spectrum from nano/microsats to small satellites, return space vehicles through medium class orbital missions supporting the Nation’s science, technology, national defense, and commercial objectives.

The future of the industry for U.S. Department of Defense, NASA, and commercial endeavors is small and medium class missions. The Eastern Shore of Virginia is not widely recognized as a center for aerospace and the existing assets could be better integrated to leverage our marketability and viability. SET provided data shows that Resource and Development is the highest performing industrial sub-sector in terms of the relative performance of the region as compared to the Commonwealth of Virginia and nation at-large.

Objective A: Create a single, dedicated (funded) Wallops Complex marketing function to both promote Wallops Complex and supporting Eastern Shore regional capabilities i.e. (Cape Charles Port and other transportation infrastructure) while assisting potential customers to develop their concept of operations and business case elements.

Strategy	Responsibility	Key contact	Timeline		Activity Outcome/ Output Measurements	Progress Status
Establish a regional “consolidated” marketed management structure and strategy	<u>Primary:</u> Wallops Island Regional Alliance, Wallops Research Park, Accomack-Northampton Planning District Commission <u>Secondary:</u> Aerospace & Defense Working Group Partners	Peter Bale (Wallops Island Regional Alliance); Julie Wheatley (Wallops Research Park); Curt Smith (Accomack-Northampton Planning District Commission)	Short Term	June 2016 – June 2018	Develop consolidated marketing strategy and materials	Ongoing – proposals for work attained and being considered by partners
			Mid Term	June 2018 - June 2019	Gain approval for marketing strategy from all principals	Pending completion of short term strategy

APPENDIX C: EASTERN SHORE REGIONAL PLAN OF ACTION: AEROSPACE & DEFENSE

<p>Implement a consolidated marketing strategy and hire a marketing professional to represent and recruit for the Wallops Complex <i>The WIRA organizations are individually promoting the ESVA, but a consolidated strategy is needed. WIRA does not have the budget to fund this, but the Working Group Partners will seek funding to have the strategy completed or attempt to develop the strategy “in-house” over time.</i></p>	<p><u>Primary:</u> Wallops Island Regional Alliance, Wallops Research Park, Accomack-Northampton Planning District Commission <u>Secondary:</u> Aerospace & Defense Working Group Partners</p>	<p>Peter Bale (Wallops Island Regional Alliance); Julie Wheatley (Wallops Research Park); Curt Smith (Accomack-Northampton Planning District Commission)</p>	Short Term	January 2018	<p>Develop draft business plan outline to include hiring of a marketing professional</p> <ul style="list-style-type: none"> - WIRA internal committee developing strategy. Met with VA Economic Development Partnership but no progress to date. Discussions held around GOVa but no proposal submitted for 2017. In 2018, VA General Assembly did not pass bill which included dedicated VEDP position for Aerospace. - Target approx. \$200k for marketing strategy and website (WIRA could hire/manage consultant with Wallops partners providing supplementary info) - Include approx. \$7k for development of promotional video for targeted marketing for unmanned systems 	<p>Julie has an inventory and worked with VEDP to develop a program budget and will work with Peter and Curt to establish an outline</p>
			Short Term	April 2018	<p>Identify funding source or mechanism for developing consolidated marketing strategy.</p>	<p>Pending completion of short term strategy</p>
			Mid Term	July 2018	<p>Deliver a consolidated Regional Business Plan for the area. Increased activity for the local regional communities attend trade shows, compile print media secure prime marketing opportunities. Output is measured by an economic impact study that can be compared against historical data that shows increased tax revenue via employment tax figures for Accomack County</p>	<p>Pending completion of short term strategy</p>
			Mid-Long Term	January 2019	<p>Hire marketing professional to represent and recruit for the Wallops Complex</p>	<p>Pending completion of mid-term strategy</p>

Objective B: Secure funding of Class A flexible and configurable office and technical/industrial space to support campaign mode operations. Build a flexible configurable building for “campaign mode” company operations and workforce development training and certification programs in the Wallops Research Park.

<p>Build Class A office, laboratory, and flex Space</p>	<p><u>Primary:</u> Wallops Research Park (Facilitator) <u>Secondary:</u> Accomack-Northampton Planning District Commission</p>	<p>Julie Wheatley, Wallops Research Park</p>	Short/Mid Term	18 months from when a lease is signed	<p>Fill the 211 acres of the Wallops Research Park with a suitable mixture of tenants.</p> <ul style="list-style-type: none"> - Orbital ATK in need of building space for support businesses - DOD contractors in need of building space 	<p>Ongoing - Lead emerging for growth. Have concept but lack of business plan has been primary barrier. Continue to pursue government funding/loan for construction.</p>
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APPENDIX C: EASTERN SHORE REGIONAL PLAN OF ACTION: AEROSPACE & DEFENSE

Objective C: Create a state or regional level competitive launch financing and effective local and state business incentives.

Establish a regional incentive strategy	<p><u>Primary:</u> Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Virginia & Maryland Legislators, Accomack & Northampton Counties, Town of Chincoteague, Virginia Economic Development Partnership</p>	Curt Smith (Accomack-Northampton Planning District Commission)	Short Term	March 2018	<p>Establish a working group of regional legislators (VA & MD) and stakeholders to discuss and pursue regional incentive strategy development (A-NPDC to coordinate meetings).</p> <p>- VA General Assembly failed to pass bill that would have created dedicated Aerospace position at VEDP during 2018 session.</p>	Proposal developed to be submitted to MD legislation for 2018 session. MD legislators and VA Governor at Wallops for UMS demo. VA legislation failed in 2018.
	Julie Wheatley (Wallops Research Park), Stephen Moret (Virginia Economic Development Partnership)	Short Term	July 2016 – March 2018	<ul style="list-style-type: none"> • Include options for incentive programs that will attract aerospace and technology-related business to the region. • Develop an interstate compact to authorize Celestial Revenue Bonds to finance the launch of spacecraft to be repaid with generated revenue over the life of the spacecraft • Re-establish HUB Zones in Accomack and Northampton Counties 	Pending completion of short-term strategy	

Objective D: Attract new additional space launch programs or missions to fly from the Wallops Complex to the rate of 6-10 major launches per year by 2021.

<p>Pursue the basing of next-generation launch systems at the Wallops Complex.</p> <p><i>This strategy is supported by the market potential identified in the May 2018 Draft Wallops Flight Facility Site-wide Programmatic Environmental Impact Statement</i></p>	<p><u>Primary:</u> Virginia Space</p> <p><u>Secondary:</u> Wallops Island Regional Alliance, NASA Wallops</p>	Dale Nash (Virginia Space), NASA Wallops New Business Office	Short Term	July 2018	<ul style="list-style-type: none"> • Integrate this objective as a principle marketing objective for the Marketing Strategy to be developed under Objective A. • Conduct vendor tours of Wallops Complex capabilities • Wallops Complex to host LEO Air Launch demonstration missions in 2018, 2019, and 2020 by one or more providers. • Permanent availability of nano/microsatellite Air Launch support capability from WRP established, ideally with carrier aircraft based here. 	Ongoing - Vector for 3 microsatellite launches in 2018 with more to come. Emerging competitors for Vector include RocketLab, Firefly, and Virgin Orbital. Still need to work as group to incorporate this strategy into Objective A
Develop dedicated launch and other end-to-end mission support capabilities for a variety of small launch systems	<p><u>Primary:</u> Virginia Space</p> <p><u>Secondary:</u> NASA Wallops</p>	Dale Nash (Virginia Space), NASA Wallops	Short Term	October 2018	<ul style="list-style-type: none"> • Integrate this objective as a principle marketing objective for the Marketing Strategy to be developed under Objective A. • Identify funding opportunities to develop the capabilities. 	Ongoing - Still need to work as group to incorporate this strategy into Objective A No update for April 2018

APPENDIX C: EASTERN SHORE REGIONAL PLAN OF ACTION: AEROSPACE & DEFENSE

Objective E: Develop a workforce development/continuing education presence in the Wallops Research Park based on completed feasibility study.

Review 2008 feasibility study and update as necessary	<u>Primary:</u> Wallops Research Park <u>Secondary:</u> Aerospace & Defense Working Group Partners	Julie Wheatley (Wallops Research Park)	Short/Mid Term	Dec. 2018	One finalized feasibility study reported to Aerospace & Defense Working Group	Not started
Implement strategies set forth in feasibility study	<u>Primary:</u> Wallops Research Park <u>Secondary:</u> Aerospace & Defense Working Group Partners	Julie Wheatley (Wallops Research Park)	Long Term	Dec. 2020	At least one tenant located and operating in Wallops Research Park	Not started

Objective F: Develop necessary foundational support infrastructure to support sustained growth at the Wallops Complex.

Create additional funding for local public schools through aerospace.	<u>Primary:</u> Accomack County <u>Secondary:</u> Aerospace & Defense Working Group Partners	Julie Wheatley (Wallops Research Park)	Short Term	Dec. 2018	Research innovative local funding mechanisms generated by aerospace in other localities/regions	Not started
			Mid Term	June 2019	Pursue identified opportunities and complete at least one new partnership/opportunity	Not started
Assess and develop needed housing to support sustained growth at the Wallops Complex	<u>Primary:</u> Accomack County; Accomack-Norhampton Planning District Commission <u>Secondary:</u> Aerospace & Defense Working Group Partners	Julie Wheatley (Wallops Research Park); Elaine Meil (Accomack-Norhampton Planning District Commission)	Short/Mid Term	June. 2019	Assess housing needs of Wallops Complex partners including affordability.	Not started
			Mid Term	Dec. 2019	Identify and pursue necessary funding for housing development that meets needs of Wallops Complex	Not started
			Long Term	Dec. 2020	Construct housing	Not started

APPENDIX C: EASTERN SHORE REGIONAL PLAN OF ACTION: AEROSPACE & DEFENSE

GOAL 2: Increase technology development, manufacture, and operations for unmanned aerial, underwater, and ground based systems (unmanned systems (UMS)) in the Eastern Shore of Virginia region. This shall include the full spectrum of activities from design through manufacture, pilot testing, test, and operations. The goal would be to increase the number of local jobs and operational hours by 25% each year from a base year of 2016.

The challenge has been to attract technology education partners to the Eastern Shore of Virginia for unmanned systems testing in all three domains. It is important to achieve this goal to support Commonwealth invested Infrastructure developments, of both the Wallops Research Park and the UAS runway. The area needs to value add to these investments and create return on investments at both state and county levels. This will increase activity at the NASA Wallops Flight Facility and raise awareness of the unique capabilities and the wide variety of opportunities that exist. Successful implementation of this goal will stimulate the economy by driving high-tech educated jobs into the employment pipeline.

Objective A: Partner with other regions within the Commonwealth to provide comprehensive end to end government and commercial unmanned systems capabilities.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Partner with the Hampton Roads Economic Development Alliance. Attract a local Virginia university with strength in this area (i.e. Virginia Tech). Strengthen relationship with the Virginia Institute of Marine Science and other institutions as pertains to sea coast erosion and the use of unmanned air and sea vehicles.	<u>Primary:</u> Virginia Space, Wallops Island Regional Alliance <u>Secondary:</u> Accomack County, Accomack-Northampton Planning District Commission	Dale Nash (Virginia Space), Peter Bale (Wallops Island Regional Alliance)	Hampton Roads Economic Development Alliance			
			Short Term	180 days	<ul style="list-style-type: none"> • MOU between Accomack County as a member • Attract 1 new business in sector to demonstrate at the NASA Wallops • Attract 1 new business to area permanently 	<ul style="list-style-type: none"> • Hampton Roads Economic Development Alliance 0% • NASA Langley 40% WIRA has been invited to a new ESVA Chamber Consortium,
			Virginia Tech			
			Short Term	120 days	<ul style="list-style-type: none"> • Fly at the new UAS runway with earth science payload • Identify and pursue use of the UAS runway on an ongoing basis as a paying tenant • Explore potential opportunity for collaboration with Agriculture Research & Extension Center in Painter to assist with research 	Ongoing – Need to contact VT AREC to discuss potential collaboration

APPENDIX C: EASTERN SHORE REGIONAL PLAN OF ACTION: AEROSPACE & DEFENSE

Virginia Institute of Marine Science/Randolph-Macon College/University of Delaware						
			Short Term	90 days		
					<ul style="list-style-type: none"> Develop and submit underwater UAS proposal to the Mid-Atlantic Coastal Research Institute Establish budget requirement Perform routine ongoing ocean measurements at Wallops coast. 	Ongoing –UMS demo held in Fall 2017. Multiple coastal resilience proposals utilizing UMS submitted and developing. Complete if funded.
Objective B: Attract commercial UAS companies for short term and permanent tenant status.						
Develop a variety of concepts or operations tailored to attract UMS companies to the Wallops Complex	<p><u>Primary:</u> Wallops Research Park</p> <p><u>Secondary:</u> Virginia Space, Wallops Island Regional Alliance</p>	Julie Wheatley (Accomack County), Peter Bale (Wallops Island Regional Alliance)	Short Term	Oct. 2017	<ul style="list-style-type: none"> Increasing number of companies using Wallops Complex facilities on a more frequent basis in campaign mode Permanent complany facilities at Wallops Complex State funded incubator facility to the Wallops Research Park to attract business to operate as a return on investment opportunity for Virginia to attract all as mentioned to become small footprint tenants to the region 	Sentinel Robotic Solutions located in Wallops. Other potential developments ongoing. Runway booked April-November 2018 to test Navy scenarios.

GOAL 3: Develop and market two research programs to increase regional coastal resilience by 2020.

With over \$1 Billion in federal and state infrastructure located within several meters of sea level on Wallops Island, understanding the fundamental coastal processes occurring in the region is essential to the long-term viability of the Wallops Complex. When equipped with the best available scientific information, facility managers will be able to adjust their respective management strategies so as remain viable in the face of climate change. In turn, the economic benefits made possible by the Complex’s mission success will continue to serve the region for years to come. Furthermore, the unique characteristics of the Wallops Complex - including its coastal location, restricted airspace, and runway infrastructure - coupled with NASA’s commitment to making the Wallops Island shoreline a “living laboratory” – make the area an ideal testbed for development of UMS-based sensors. Demonstrated success in this line of business will not only increase regional economic inputs including meals and transient occupancy but could also spur UMS companies’ capital investments in the area.

Objective A: Deploy a network of permanent and semi-permanent oceanographic sensors within the Assateague-Wallops-Assawoman multi-island system.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Secure funding for Phases I and II of Integrated Barrier Island System project	<u>Primary:</u> NASA Wallops <u>Secondary:</u> Mid-Atlantic Coastal Resiliency Institute partners	Josh Bundick, NASA Wallops	Short Term	2016-2018	1) Research money spent in region 2) Number of sensors and instruments in the on-shore, off-shore and near-shore environment	Proposal development - No update for November 2017 or April 2018
Complete Phases I and II of Integrated Barrier Island System project	<u>Primary:</u> NASA Wallops <u>Secondary:</u> Mid-Atlantic Coastal Resiliency Institute partners	Josh Bundick, NASA Wallops	Mid Term	2018-2020	1) Research money spent in region 2) Number of sensors and instruments in the on-shore, off-shore and near-shore environment	Pending completion of short-term strategy

Objective B: Demonstrate the utility of both aerial and underwater UMS for collecting high resolution, repeatable, topographic and shallow-water bathymetric datasets.

Secure funding for Phases I and II of Integrated Barrier Island System project	<u>Primary:</u> NASA Wallops <u>Secondary:</u> Mid-Atlantic Coastal Resiliency Institute partners	Josh Bundick, NASA Wallops	Short Term	2016-2018	1) Research money spent in region 2) Number of UMS flight and/or underwater hours	Proposal development – coordination with US Army Corps for support of project No update for April 2018
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APPENDIX C: EASTERN SHORE REGIONAL PLAN OF ACTION: AEROSPACE & DEFENSE

Complete Phases I and II of Integrated Barrier Island System project	<u>Primary:</u> NASA Wallops <u>Secondary:</u> Mid-Atlantic Coastal Resiliency Institute partners	Josh Bundick, NASA Wallops	Mid Term	2018-2020	1) Research money spent in region 2) Number of UMS flight and/or underwater hours	Pending completion of short-term strategy
Objective C: Market the region as a testbed for conducting UMS-based coastal research.						
Develop marketing materials	<u>Primary:</u> NASA Wallops <u>Secondary:</u> Mid-Atlantic Coastal Resiliency Institute partners	Josh Bundick, NASA Wallops	Short/Mid Term	On-going during 2016-2020	Number and types of marketing materials developed	In development – No update for November 2017 or April 2018
Deploy marketing representatives at industry and academic venues	<u>Primary:</u> NASA Wallops <u>Secondary:</u> Mid-Atlantic Coastal Resiliency Institute partners	Josh Bundick, NASA Wallops	Short/Mid Term	On-going during 2016-2020	Number of industry/academic gatherings attended	In development - No update for November 2017 or April 2018
Objective D: Implement adaptive management practices on dynamic high-energy properties to assist with enhancing regional coastal resilience.						
Help the US Fish & Wildlife Service, NASA, and Chincoteague explore adaptive management practices that sustain resiliency of Assateague, Wallops, Assawoman and Metompkin Islands	<u>Primary:</u> Eastern Shore of Virginia Climate Adaptation Working Group Partners, Including Accomack-Northampton Planning District Commission, The Nature Conservancy, Research Institutions <u>Secondary:</u> US Fish and Wildlife Service, NASA, Chincoteague	Curt Smith, Accomack-Northampton Planning District Commission	Short/Mid Term	On-going during 2018-2020	Gather barrier island property managers upon completion of new, relevant coastal research to learn of outcomes, consider implications, and explore related adaptive management practices.	Ongoing – Randolph-Macon & VIMS research underway and to be continued with plans to share information

APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

GOAL 1: Develop a value added fresh food marketing cooperative to aggregate and market locally produced aquaculture, produce, and viticulture; create an identifiable Eastern Shore brand; increase crop diversity; and increase production and sale by 20% by December 2018. This goal is in support of and is targeted toward small farmers.

Objective A: Assess the regional production capacity (small farmer focus).

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Inventory growers at this scale and evaluate current production along with potential capacity.	<i>Primary:</i> USDA offices (NASS, FSA) <i>Secondary:</i> Virginia Cooperative Extension, Virginia State University, Virginia Institute of Marine Science, Virginia Shellfish Growers Association	USDA/FSA; Patrick Johnson (Virginia State University); Karen Hudson (Virginia Institute of Marine Science)	Short Term	October 2017	Comprehensive inventory publication of all vegetable, grain, fiber, and oilseed crops and aquaculture. - VIMS compiles a non-ESVA-specific annual report on shellfish production based on survey results - FSA/NASS compile data for larger ag. operations	Incomplete and pending- Current inventory/surveys available but need to fill in data holes. USDA-RD grant app submitted Apr. 2018 will capture data if funded.
Conduct a feasibility study for expanding locally-produced products with additional consideration for organic and value-added products.	<i>Primary:</i> Virginia Dept. of Agriculture & Consumer Services, Accomack-Northampton Planning District Commission <i>Secondary:</i> Virginia Finest Program, Delmarva Farmers Union, Eastern Shore Resource Conservation & Development Council, Perennial Roots Farm	Butch Nottingham (Virginia Dept. of Agriculture & Consumer Services); Curt Smith (Accomack-Northampton Planning District Commission)	Short/ Mid Term	October 2018	Economic analysis of high margin items and processed goods and feasibility of raising items on the Eastern Shore. - Need to pursue USDA Value-Added Producer Grants through farmers and USDA Rural Business Development Grants through A-NPDC - Include grain, hops, etc. for breweries & distilleries. - Consider if additional or mobile Farmers Markets are needed. Also identify issues with current restrictions ut on market vendors. - Assess warm and cold storage needs	Pending – USDA Rural Business Development Grant submitted April 2018. Notice of award expected summer/fall 2018.
Conduct a feasibility study for expanding local seafood processing capacity with additional consideration for value-added products	<i>Primary:</i> Accomack-Northampton Planning District Commission, Robert S. Bloxom Agricultural Complex <i>Secondary:</i> Toms Cove Aquafarms,	Curt Smith (Accomack-Northampton Planning District Commission); Add Nottingham (Robert S. Bloxom Agricultural Complex)	Mid-Long Term	October 2019	Economic analysis of seafood products and feasibility of increasing value of local products	Pending completion of ag. feasibility study

APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

Objective B: Assess the potential for specific farm and farmer’s markets throughout the Eastern Shore.

Design a study to assess the market potential for sales off of the Eastern Shore.	<p><u>Primary:</u> Virginia Dept. of Agriculture & Consumer Services</p> <p><u>Secondary:</u> USDA-NASS, USDA-ERS, Virginia Tech, Virginia Institute of Marine Science, Virginia Marine Products Board</p>	Butch Nottingham (Virginia Dept. of Agriculture & Consumer Services)	Mid Term	January 2019	<ul style="list-style-type: none"> Product movement from the Eastern Shore to large city centers Establishment of contracts with markets and restaurants off the shore <ul style="list-style-type: none"> - Local sales to: Food Lion, Walmart, Publix, Military Produce, Kroger, and Shockley Farms Farm Stand in VA Beach 	Very few formal arrangements exist for off-shore food movement. Ag. feasibility study grant application submitted April 2018 would provide info if funded.
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Objective C: Evaluate and enhance existing agriculture business infrastructure.

Improve agriculture research facility for use by local stakeholders	<p><u>Primary:</u> Virginia Tech, Virginia Cooperative Extension, Virginia Institute of Marine Science, Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Farm Operators, Chincoteague Bay Field Station, Kiptopeke State Park, local government-owned parks</p>	Mark Reiter & Steve Rideout (Virginia Tech); Ursula Deitch & Theresa Pittman (Virginia Cooperative Extension); Richard Snyder (Virginia Institute of Marine Science); Curt Smith (Accomack-Northampton Planning District Commission)	Short Term	August 2018	Hold meeting among primary stakeholders to develop needs assessment for local education and research facilities	Curt to coordinate meeting during Summer 2018 in advance of regional infrastructure planning meeting
			Long Term	January 2020	<ul style="list-style-type: none"> Improve meeting facilities and demonstration areas for information dissemination for stakeholders Funding needed to improve research laboratories for assistance with local questions Purchase necessary equipment to produce new and innovative crops in test and demonstration plots Opportunity for farmers to share innovative growing techniques (best practices) 	Ongoing - Several projects in planning phase but implementation needs support and funding. VIMS has funding from General Assembly to rebuild Eastern Shore Lab with new hatchery, research building, and 3 other support buildings to be completed by 2021

Objective D: Research and promote production opportunities.

Specialty Crops - Explore at least 3 (Hops, sweet potatoes, new varieties of potatoes, horseradish, lavender, herbs, asparagus, grapes (viticulture), bay scallops, Hog Island figs and honey)	<p><u>Primary:</u> Virginia Tech, Virginia Institute of Marine Science, Virginia Cooperative Extension</p> <p><u>Secondary:</u> Agriculture and Aquaculture Business Owners</p>	Mark Reiter & Ramon Arancibia (Virginia Tech); Richard Snyder (Virginia Institute of Marine Science); Ursula Deitch & Theresa Pittman (Virginia Cooperative Extension)	Mid Term	Dec. 2020	<ul style="list-style-type: none"> Identification and production practice development for novel and innovative specialty crops and markets for Eastern Shore farmers. Identify new aquaculture opportunities for Eastern Shore producers. Grant funding to support new crop research <ul style="list-style-type: none"> - USDA Value Added Producer Grant 	Ongoing – Crop research grants acquired but promotion production opportunities still needed. VIMS working on restoration grant.
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APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

					<ul style="list-style-type: none"> Grant funding to support needed outreach and staffing for Virginia Cooperative Extension 	
Test process for season extension of vegetable production. For example: sweet potatoes, white potatoes and strawberries	<p><u>Primary:</u> Virginia Tech</p> <p><u>Secondary:</u> Virginia Cooperative Extension, Eastern Shore Resource Conservation & Development Council</p>	Mark Reiter & Ramon Arancibia (Virginia Tech), Ursula Deitch & Theresa Pittman (Virginia Cooperative Extension); Josephine Mooney (Eastern Shore Resource Conservation & Development Council)	Long Term	January 2020	<ul style="list-style-type: none"> High tunnels Identify, research, and demonstrate new technologies for season extension to give farmers longer crop producing time (high and low tunnels, row covers) Identify profitable crops that are marketable during the shoulder seasons. Grant dollars to support research and Extension programs 	Planning and preliminary data collection ongoing. Season extension projects ongoing. Educational talks being held across the state. High tunnel work continuing.
Objective E Encourage participation in a buy fresh, buy local chapter.						
Expand current interests with a formal establishment of a Buy Fresh, Buy Local Eastern Shore chapter.	<p><u>Primary:</u> Delmarva Farmers Union, Virginia Tech, Virginia Cooperative Extension</p> <p><u>Secondary:</u> Virginia Dept. of Agriculture & Consumer Services, Virginia Institute of Marine Science, Eastern Shore Resource Conservation & Development Council</p>	Stewart Lundy (Delmarva Farmers Union); Ramon Arancibia (Virginia Tech); Ursula Deitch & Theresa Pittman (Virginia Cooperative Extension); Josephine Mooney (Eastern Shore Resource Conservation & Development Council)	Short/Mid Term	<ul style="list-style-type: none"> Farmer Launch: Sep. 2017 Public Launch: May 2018 	<ul style="list-style-type: none"> Delmarva Farmers Union established and launched brand early in 2018 Establish an Eastern Shore Chapter with 20 members. Members present at each of the local farm markets. <ul style="list-style-type: none"> No grant funding received to date Evaluation ongoing 	Need to confirm interest in local participation remains as some farmers already belong to Hampton Roads Buy Fresh Buy Local group.

APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

GOAL 2: Develop a wholesale production that supports larger-scale farmers to add value to crops and aquaculture grown on the Shore and create value added opportunities.

Objective A: Research priority crop production.

Research production practices	<u>Primary:</u> Virginia Cooperative Extension, Virginia Tech <u>Secondary:</u> Virginia Dept. of Agriculture & Consumer Services, USDA – FSA, USDA-NASS,	Ursula Deitch & Theresa Pittman (Virginia Cooperative Extension); Ramon Arancibia (Virginia Tech); Richard Snyder (Virginia Institute of Marine Science)	Short Term	Dec. 2017	Identification and production practice development	Current ag. and aquaculture research is ongoing, but more research and funding is needed. Snap bean trials underway in 2017 (Ramon).
Priority commodity to include aquaculture and vegetable commodities	<u>Primary:</u> Virginia Dept. of Agriculture & Consumer Services <u>Secondary:</u> Virginia Cooperative Extension, USDA – FSA, USDA-NASS, Virginia Tech Association of Potato & Vegetable Growers	Butch Nottingham (Virginia Dept. of Agriculture & Consumer Services); Richard Snyder (Virginia Institute of Marine Science)	Long Term	Dec. 2020	<ul style="list-style-type: none"> Identify, research, and demonstrate new technologies for dissemination to growers in order to increase profitability and yields Identify profitable crops that are marketable Identify grant dollars to support research and Extension programs. 	Current ag. and aquaculture research is ongoing, but more research and funding is needed.

Objective B: Assess and address infrastructure needs.

Natural Gas	<u>Primary:</u> Accomack & Northampton County Boards of Supervisors <u>Secondary:</u> Delegate Rob Bloxom, Directors of Economic Development, Local Suppliers	Board of Supervisors – Accomack County	Mid Term	Dec. 2019	<ul style="list-style-type: none"> Assistance with extending a natural gas line into Accomack County from Maryland to serve Eastern Shore residents and commercial operations Key to food processing – many of the operations setup to utilize natural gas not electricity 	Project currently undergoing FERC process
Conduct a needs assessment for cold and warm ag storage.	<u>Primary:</u> Virginia Cooperative Extension <u>Secondary:</u> Virginia Dept. of Agriculture & Consumer Services, USDA – FSA, USDA-NASS, Virginia Tech	Ursula Deitch & Theresa Pittman (Virginia Cooperative Extension); Butch Nottingham (Virginia Dept. of Agriculture & Consumer Services)	Mid Term	Dec. 2018	Conduct assessment of warm and cold storage that may lead to expansions of existing sites such as the Bloxom Agricultural Complex or additional construction.	Ongoing - Agriculture feasibility study grant app submitted April 2018 could assess needs.

APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

GOAL 3: Develop a sawmill on the Eastern Shore of Virginia by December 2018. (Pine)

The forest resource on the Eastern Shore has been devalued by more than 50% since 2007 because of the loss of 80% of industrial sawmill capacity on the Delmarva peninsula, thereby reducing asset values to both Eastern Shore of Virginia forestland owners and the real estate tax base required for local County revenue generation.

Objective A: Educate local public officials in both Accomack and Northampton Counties and State Officials on the community economic impact of the loss of pine saw timber manufacturing on the Eastern Shore of Virginia.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Conduct presentation to both County Boards of Supervisors in 2017 and 2018	<u>Primary:</u> Eastern Shore of Virginia Chamber of Commerce, Virginia Dept. of Forestry <u>Secondary:</u> Virginia Dept. of Agriculture & Consumer Services	Steve Mallette (Eastern Shore of Virginia Chamber of Commerce); Robbie Lewis (Virginia Dept. of Forestry)	Short Term	Present in Fall 2017 and Fall 2018	Develop County support to provide partial funding for an Eastern Shore Forest Inventory and Market develop plan. Cost sharing available VDACS Agricultural and Forestry Industry Development Planning Grant	2017 – Complete 2018 – Accomack County meetings begun

Objective B: Obtain funding for development of Eastern Shore Forest Inventory and Pine Sawmill Marketing Plan.

Solicit local and state supporters for Planning Grant(s)	<u>Primary:</u> Eastern Shore of Virginia Chamber of Commerce, Accomack-Northampton Planning District Commission <u>Secondary:</u> Agribusiness & Food Processing Working Group Partners	Robie Marsh (Eastern Shore of Virginia Chamber of Commerce); Curt Smith (Accomack-Northampton Planning District Commission)	Mid Term	Fall 2018	Obtain letters of support for Planning Grant(s) including the Virginia Board of Forestry and Virginia Agribusiness Council - Some letters of support attained but still need: o Forest landowners/stakeholders o Both County Board of Supervisors o Wildlife stakeholders o Farm Bureau in both Counties	Ongoing
Prepare application for Governor's Agriculture and Forestry Industries Development Grant and US Forest Service Planning Grant	<u>Primary:</u> County Economic Development Directors, Accomack-Northampton Planning District Commission <u>Secondary:</u> Virginia Department of Forestry, Virginia Dept. of Agriculture & Consumer Services, U.S. Fish & Wildlife Service, others	County Economic Development Directors, Curt Smith (Accomack-Northampton Planning District Commission)	Mid Term	Winter/Spring 2019	Obtain approx. \$100,000 for planning grant - Need to identify match, if needed	Started - Initial grant app development discussions and strategies held during Spring 2018

APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

Objective C: Develop a regional Eastern Shore Forest Inventory and Pine Sawmill Marketing Plan.						
Solicit Request for Proposals for Plan	<u>Primary:</u> Accomack and Northampton Counties, Accomack-Northampton Planning District Commission <u>Secondary:</u> Private service providers	County Economic Development Directors, Curt Smith (Accomack-Northampton Planning District Commission)	Mid Term	Summer 2019	Planning document that categorizes extent and type of forest resources available and associated domestic and international marketing opportunities to attract investors - Complete inventory/marketing plan (1 year duration)	Pending award of grant
Objective D: Attract forestry sector operations.						
Attract a sawmill company to create a mill on the Eastern Shore.	<u>Primary:</u> Accomack and Northampton Counties, Accomack-Northampton Planning District Commission <u>Secondary:</u> Investors, Virginia Dept. of Agriculture & Consumer Services, Virginia Dept. of Forestry, Governor's office	County Economic Development Directors, Curt Smith (Accomack-Northampton Planning District Commission)	Long Term	2020-2021	Creation of Eastern Shore of Virginia pine sawmill manufacturing facility	Not started - Pending award of grant and completion of study

APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

GOAL 4: Equip individuals with appropriate skills to work in the agribusiness and food processing cluster.

Objective A: Establish agricultural education and training programs in middle/high schools and at the community college level.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
By graduation every student has a Meaningful Agricultural Experience (MAgE)	<u>Primary:</u> Accomack & Northampton County School Boards, Eastern Shore Soil & Water Conservation District, Virginia Cooperative Extension <u>Secondary:</u> Agribusiness & Food Processing Working Group Partners	Carmie Savage (Eastern Shore Soil & Water Conservation District); Ursula Deitch & Theresa Pittman (Virginia Cooperative Extension); Accomack & Northampton County School Superintendents	Mid Term	By 2018/2019	<ul style="list-style-type: none"> • Farm Tours • Aquaculture Tour/Experience • Pumpkin Mania • School Gardens • Job Shadow within industry • Agriculture Fairs • Watershed Festivals • Internships • ESSWCD Soils Trailer (new in Fall 2018) 	Ongoing - Currently being held with plans to expand. CTE High School Curriculum John Pavlik and Susie Henderson in Northampton Co.
Expand non-credit, but credential oriented training program with a focus on areas of agribusiness	<u>Primary:</u> Eastern Shore Community College <u>Secondary:</u> Agribusiness & Food Processing Working Group Partners	TJ Johnson (Eastern Shore Community College)	Short/Mid Term	December 2017	Offer noncredit training leading to industry-recognized credentials - ESCC's Adult Ed. Program does offer classes on-site at Tyson and exploring similar classes at Perdue. These classes incorporate basic work skills in the industry.	Ongoing – need to add quantifiable metrics to this strategy
Establish an active and engaged Future Farmers of America (FFA) program in public schools on the Eastern Shore of Virginia	<u>Primary:</u> Accomack & Northampton County School Boards <u>Secondary:</u> Farm Bureau, Virginia Future Farmers of America Foundation, Young Farmers of Virginia, Agribusiness & Food Processing Working Group Partners	Accomack & Northampton County School Superintendents	Mid Term	By 2018-2019 school year	<ul style="list-style-type: none"> • Agriculture Teachers in High Schools • Regional FFA Competition • Certificate Programs 	Planning phase – No update provided for November 2017 or April 2018
Establish a college level program at Eastern Shore Community College	<u>Primary:</u> Eastern Shore Community College; Accomack-Northampton Planning District Commission <u>Secondary:</u> Agribusiness & Food Processing Working Group Partners	TJ Johnson (Eastern Shore Community College); Curt Smith (Accomack-Northampton Planning District Commission)	Long Term	By 2020 the first cohort will have associate degree	<ul style="list-style-type: none"> • Agribusiness Associate • Horticulture Associate • Aquaculture Associate Degree – ESCC, VIMS and private aquaculture partners currently discussing potential programs <p>Build upon Building a Sustainable rural business class</p>	Progress being made regarding aquaculture but agribusiness and horticulture not started. No update for April 2018.

Objective B: Prepare skilled labor within specific industries: nursery, vegetable, aquaculture and grain crops.

APPENDIX D: EASTERN SHORE REGIONAL PLAN OF ACTION: AGRIBUSINESS & FOOD PROCESSING

<p>Develop an apprenticeship with the private sector</p>	<p><u>Primary:</u> Eastern Shore Community College <u>Secondary:</u> Agricultural associations (Farm Bureau, Potato, Soybean board, Nurserymen)</p>	<p>TJ Johnson (Eastern Shore Community College)</p>	<p>Mid Term</p>	<p>2018</p>	<ul style="list-style-type: none"> • Skilled labor ready to enter workforce <ul style="list-style-type: none"> - ESCC has an apprenticeship program with Tyson Foods in the Industrial Technology program. Students begin employment in their 2nd year of education, work at Tyson for a good wage (\$14/hour) and this leads to full-time employment with benefits. - ESCC has held discussions with the aquaculture industry and are providing assistance to meet their workforce needs through non-credit offerings • Establish industry specific job fair 	<p>Ongoing</p>
<p>Fund, expand and market internship programs – target agribusiness and aquaculture</p>	<p><u>Primary:</u> Eastern Shore Community College, Virginia Institute of Marine Science <u>Secondary:</u> University of Virginia, Virginia Tech, Virginia Cooperative Extension</p>	<p>TJ Johnson (Eastern Shore Community College), Richard Snyder (Virginia Institute of Marine Science)</p>	<p>Mid/ Long Term</p>	<p>2019</p>	<ul style="list-style-type: none"> • 50% increase of interns at each school – Need to establish baseline year (2016 or 2017?) <ul style="list-style-type: none"> - Currently in progress, but expansion to other programs at ESCC is planned in the next 1-2 years - VIMS ESL supports 5 interns each summer • 30% more funding – <ul style="list-style-type: none"> - Funding ended on June 30, 2016 but the program will continue. Additional resources need to be secured. ESCC does market the internship program through all marketing venues 	<p>Current and ongoing internships exist at schools. VIMS supports 5 interns each summer since 2010. Attendance at other schools and cumulative regional attendance has yet to be quantified. Current internships also at Tyson and Perdue.</p>

APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

GOAL 1: Develop the Eastern Shore as a well-managed tourism destination.

A major component in the success of fueling growth in a tourism destination is marketing the region and the region's development opportunities effectively. Destination tourism is publicized as an important source of income for the Eastern Shore. A 2013 report by the Virginia Tourism Corporation (VTC) indicated that domestic travel in Virginia generated \$20.4 billion representing an 8% increase over the 2010 figures. Domestic travel to the Eastern Shore generated approximately \$254 million in customer spending during 2014. During the 2012 Virginia Outdoors Plan public meetings, the region established the importance of balancing economic endeavors with conservation as a regional priority. In addition, the small-town qualities of the Eastern Shore, including tourism outdoor recreation attractions in Onancock, are highly valued and are being promoted by the Eastern Shore Tourism Commission. <http://www.dcr.virginia.gov/recreational-planning/document/voppd22.pdf>

Objective A: Promote regional tourism events and opportunities.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status (As of Nov. 2017)
Complete a regional tourism strategic plan that rolls up to the state's DRIVE tourism strategic plan	<u>Primary:</u> Eastern Shore of Virginia Tourism Commission, Accomack-Northampton Planning District Commission <u>Secondary:</u> Chambers of Commerce, County and Town Leadership, Eastern Shore Museum Network, Eastern Shore Public Library, Virginia Tourism Corporation	Kerry Allision (Eastern Shore of Virginia Tourism Commission); Curtis Smith (Accomack-Northampton Planning District Commission)	Short Term	Summer 2018	Develop a scope of work and budget for development of regional tourism strategic plan.	Not Started
			Mid Term	January 2020	A completed prioritized strategic plan that provides a 5-10 year plan for the Eastern Shore that will identify gaps, infrastructure needs, tourism product development, legislative needs, marketing and partnerships. Tourism strategic plan needs to be combined with regional agriculture/artisan goods marketing strategy/brand development.	Determined VTC can't lead and need to identify funding for regional plan.

APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

<p>Develop a scalable technology platform to meet present and future industry and consumer demands</p>	<p><u>Primary:</u> Eastern Shore of Virginia Tourism Commission, Web developer <u>Secondary:</u> Arts, Entertainment, Recreation & Visitor Industries Subcommittee partners, Towns, Accomack and Northampton Counties, Accomack-Northampton Planning District Commission</p>	<p>Kerry Allison, Eastern Shore of Virginia Tourism Commission</p>	<p>Mid Term</p>	<p>January 2019</p>	<p>Update Eastern Shore Tourism website with desired capacities</p>	<p>Regional tourism website build underway.</p>
<p>Create marketing program to target new groups, including group tours, weddings/special events/corporate meetings, multi-generational family travel, camping</p>	<p><u>Primary:</u> Eastern Shore of Virginia Tourism Commission <u>Secondary:</u> County Economic Development Staff, Town Leaders, Eastern Shore Museum Network, Eastern Shore Public Library</p>	<p>Kerry Allison (Eastern Shore of Virginia Tourism Commission)</p>	<p>Mid Term</p>	<p>January 2019</p>	<p>Funding to produce marketing materials; increase in campsite utilization; increase in vacation rental occupancy rates; increase in wedding and group/bus tour bookings</p> <ul style="list-style-type: none"> • Chincoteague Chamber: ads in VMA Membership Directory 2017 resulting in at least one tour booked; ad in Leisure Group Travel Magazine 2017 resulted in multiple leads; website updated to include pages for group tours and weddings • ESVA Tourism Commission highlighting content in new website. New website to include group tours, weddings, and camping once launched (currently under development). 	<p>Marketing program focus for multi-generational family travel still needed. Other aspects will be completed with launch of new tourism website during winter 2019</p>

APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

<p>Build tourism “shoulder” season to extend tourism activity beyond high season 90-day window, leveraging regional trails and key annual events</p>	<p><u>Primary:</u> Eastern Shore of Virginia Tourism Commission, <u>Secondary:</u> Virginia Tourism Corporation, USDA-Rural Development, Virginia Dept. of Housing & Community Development, Virginia Seafood Industry & Seafood Lobby Groups, Eastern Shore Museum Network, Eastern Shore Public Library, Virginia Oyster Trail Management Team of the Eastern Shore of Virginia, Artisan Trail Management Team of the Eastern Shore of Virginia, Chincoteague and ESVA National Wildlife Refuges</p>	<p>Kerry Allison (Eastern Shore of Virginia Tourism Commission)</p>	<p>Short-Mid Term</p>	<p>July 2018</p>	<p>Development of funds to market tourism assets that bring consumers during shoulder seasons: Artisan and Oyster Trails, key annual industry events (Fall Oyster/Culinary Events; Birding/Winter Recreation; Industry partners display signage, brochures, host events; increase in trail-related business activity, increase in attendance/ROI at key events; increase in key performance measures; expansion of tourism season with increased ROI throughout the year)</p> <ul style="list-style-type: none"> • Oyster and Artisan Trails: visibility in 2017 and 2018 Chincoteague Visitor Guide • ESVA Tourism Commission has data on ROI • Birding – Chincoteague and ESVA National Wildlife Refuges see influx of visitors during peak spring migration in May (Int’l Migratory Bird Celebration) and peak fall migration in November (Waterfowl Week). These two events could be a catalyst for a regional birding event • Private sector partnerships: Chatham Vineyards in 2016/2017 • NPR marketing in Hampton Roads complete with plans for expansion to DC metro market next 	<p>Ongoing and with continued expansion needed. Need to grow the budget for continued marketing efforts, finding private sector partners (ie. Chatham) and building winter time as a birding and wildlife watching destination.</p>
<p>Objective B: Establish ESVA brand as a highly-recognized and utilized promotion tool.</p>						
<p>Evaluate effectiveness of existing Eastern Shore brand, “You’ll love our Nature” and enhance brand integration to all local industry</p>	<p><u>Primary:</u> Eastern Shore of Virginia Tourism Commission; Virginia Tourism Corporation <u>Secondary:</u> Eastern Shore of Virginia Chamber of Commerce, Northampton County Chamber of Commerce, Chincoteague Chamber of Commerce, Brand Expert, Eastern Shore Museum Network, Eastern Shore Public Library</p>	<p>Kerry Allison (Eastern Shore of Virginia Tourism Commission); Staci Martin, Virginia Tourism Corporation</p>	<p>Short Term</p>	<p>January 2019</p>	<p>Attain funding to hire brand management experts and evaluate brand equity, opportunities, sub brands and enhanced industry integration across the region</p>	<p>Ongoing - Completed merchandising plan. Next step is to consult with brand expert from VCU</p>

APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

Educate the frontline tourism workforce and community on regional assets and customer service	<p><u>Primary:</u> Eastern Shore of Virginia Chamber of Commerce, Eastern Shore of Virginia Tourism Commission, Chincoteague Chamber of Commerce, Eastern Shore Community College</p> <p><u>Secondary:</u> Northampton County Chamber of Commerce, County Economic Directors, Eastern Shore Public Library</p>	Robie Marsh (Eastern Shore of Virginia Chamber of Commerce); Kerry Allison (Eastern Shore of Virginia Tourism Commission); Evelyn Shotwell (Chincoteague Chamber of Commerce); TJ Johnson (Eastern Shore Community College)	Short Term	Dec. 2017 and ongoing annually	Tourism trainings/workshops with at least 50 frontline workforce staff completing at least 1 training/workshop each year	Complete for 2017 and ongoing annually No update provided for April 2018
Leverage local industry to sell Eastern Shore products	<p><u>Primary:</u> Eastern Shore of Virginia Chamber of Commerce, Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Northampton County Chamber of Commerce, Chincoteague Chamber of Commerce</p>	Robie Marsh (Eastern Shore of Virginia Chamber of Commerce); Curtis Smith (Accomack-Northampton Planning District Commission)	Short Term	Aug. 2018	Conduct regional inventory of retail shops on the Eastern Shore to establish baseline for how many carry locally made products from artisans or food producers, such as items from the Artisan trails, Eastern Shore oysters, Moonrise jewelry, Eastern Shore Coffee Roasting, Chatham Vineyards wine, Annie's Chocolates, Blue Bay Crab, or Chincoteague salt water taffy	Curt has begun regional inventory of retail shops and regional products.
			Mid Term	Dec. 2018	Assess inventory and define percentage of shops to be considered for regional goal	To be started upon completion of inventory
			Long Term	Mar. 2019	Achieve an increase of 5% in local sales of Eastern Shore products from 2017 baseline. At least 20% (need to refine this goal based on inventory findings) of retail shops on the Eastern Shore carry locally made products from artisans or food producers	Ongoing
			Long Term	June 2019	Develop in-store/point of purchase signage program for retailers. Signage could align with "Shore Made/Shore Grown" campaign	Not started.
Develop marketing program to encourage 5 million annual passengers along U.S. Route 13 to stop and spend money in the region	<p><u>Primary:</u> Eastern Shore of Virginia Tourism Commission</p> <p><u>Secondary:</u> Virginia Tourism Corporation</p>	Kerry Allison, Eastern Shore of Virginia Tourism Commission	Long Term	Spring 2019	Funding to deploy a tactical, measureable marketing program to divert 10% of passersby off U.S. Route 13. Tactics could include a combination of physical signage, radio, digital strategies	Will begin upon completion of Eastern Shore Tourism website development to allow for measuring with technology. Being held up by lack of funding.

APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

GOAL 2: Implement an ambassadorship, mentorship, and internship program to educate workers and citizens on hospitality and tourism opportunities.

To better prepare the Eastern Shore of Virginia tourism industry and frontline staff to concierge the traveling public and encourage visitors to explore the region. Currently, the closest accredited hospitality management programs are located at Tidewater Community College, J. Sargeant Reynolds, Northern Virginia Community College, and George Mason University requiring at least an hour or more travel time from the Eastern Shore.

Objective A: Establish at least 2 tourism certification programs by 2018.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status (As of Nov. 2017)
Launch tourism internship program through regional universities and local business partners	<u>Primary:</u> Eastern Shore Community College, Eastern Shore of Virginia Chamber of Commerce <u>Secondary:</u> Northampton County Chamber of Commerce, Chincoteague Chamber of Commerce	TJ Johnson (Eastern Shore Community College), Robie Marsh (Eastern Shore of Virginia Chamber of Commerce)	Mid Term	May 2018	At least 5 students participate in a tourism internship program annually. At least 10 students will attend seminars on tourism careers and opportunities	Complete? - Northampton Co. has established a high school curriculum
Create hospitality curriculum with a certification and/or Associates Degree	<u>Primary:</u> Eastern Shore Community College, Eastern Shore of Virginia Chamber of Commerce <u>Secondary:</u> Northampton County Chamber of Commerce, Chincoteague Chamber of Commerce	TJ Johnson (Eastern Shore Community College), Robie Marsh (Eastern Shore of Virginia Chamber of Commerce)	Mid Term	May 2018	A curriculum leading to a certificate and/or Associates Degree implemented at the Eastern Shore Community College per currently SCHEV-approved curriculum currently taught at Tidewater Community College	Partially Complete: ESCC certification established. Assoc. Degree still needed. Certification experiencing poor enrollment and need greater buy-in from businesses and non-profits

Objective B: Increase the understanding of regional tourism industry stakeholders on the value of tourism.

Articulate the tourism brand on a regular and ongoing basis across the region via a regional tourism newsletter and presentations	<u>Primary:</u> Eastern Shore of Virginia Tourism Commission Chincoteague Chamber of Commerce, Eastern	Kerry Allison (Eastern Shore of Virginia Tourism Commission)	Short Term	Sep. 2018	Create a Facebook group for tourism industry stakeholders <ul style="list-style-type: none"> - At least 50 members - Share content on education and opportunities to enhance business collaboration within the region 	Not Started
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APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

	Shore of Virginia Chamber of Commerce, Northampton County Chamber of Commerce <u>Secondary:</u> Town business associations, Virginia Tourism Corporation Advocacy Team, Accomack-Northampton Planning District Commission	Kerry Allison (Eastern Shore of Virginia Tourism Commission); Evelyn Shotwell (Chincoteague Chamber of Commerce); Robie Marsh (Eastern Shore of Virginia Chamber of Commerce); Elizabeth Dodd (Northampton County Chamber of Commerce)	Mid Term	Oct. 2018 and ongoing annually	Create a Tourism Ambassador community program with at least ten (10) individuals identified and trained to deliver the Eastern Shore tourism story to at least 20 civic organizations, churches, community groups, and other local stakeholders annually	<ul style="list-style-type: none"> •No program established to date; however, over 20 presentations occurred during 2016-2017, but were given by fewer than 10 individuals. •Ambassador program still needs to be formally established – perhaps ESVA Tourism Commissioners???
Develop program to enhance industry connections and assist partnership and product formation	<u>Primary:</u> Eastern Shore of Virginia Chamber of Commerce – Young Professionals Group <u>Secondary:</u> Northampton County Chamber of Commerce, Chincoteague Chamber of Commerce, Eastern Shore of Virginia Tourism Commission, Town business associations	Robie Marsh, Eastern Shore of Virginia Chamber of Commerce	Mid Term	May 2018 and ongoing annually	<p>Ten (10) networking events held in the region each year with at least 15 businesses participating in each event to enhance partnerships, networking, and economic development initiatives, using face-to-face, webinars, blogs and other tactics</p> <ul style="list-style-type: none"> • ESVA Chamber created Young Professionals Facebook group to act as a social avenue for workforce to meetup, plan activities, and become engaged in the community. Local restaurants, ecotour guides, etc. will be invited to post activities and events to act as conductor for engagement and networking with goal of employee retention. • Chincoteague Chamber holds many networking events per year focusing on various topics. 	<p>Ongoing</p> <ul style="list-style-type: none"> - Exploratory meeting for regional marketing strategy/brand development for agriculture/artisan goods that harmonizes with tourism brand held during Spring 2018

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GOAL 3: Engage local governments in enhancing support for tourism.

Build regional consensus that a robust tourism economy will transform the Eastern Shore of Virginia from one of Virginia's poorest areas to one of its most prosperous. Accomack received \$5.27 million in local taxes from domestic travel in 2014 (4.4% increase from 2013) and employed 2,000 people. Northampton received \$1.37 million in local taxes from domestic travel in 2014 (1.8% increase from 2013) and employed 780 people (Virginia Tourism Commission).

Objective A: Educate local government officials on the economic impact of regional tourism.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status (As of Nov. 2017)
Inform local government leaders annually on tourism economic impacts via in-person presentations	<u>Primary:</u> Eastern Shore of Virginia Tourism Commission <u>Secondary:</u> Chincoteague Chamber of Commerce, Virginia Tourism Corporation Advocacy Team	Kerry Allison (Eastern Shore of Virginia Tourism Commission)	Short Term and Ongoing	January (Annually)	Report to 10 government bodies on Eastern Shore tourism impacts based on Virginia Tourism Commission and local tourism indicators. - Chincoteague Chamber presents Annual Report to Town Council annually – covered by local media	Complete for 2016, 2017 and ongoing
Inform local government leaders regularly on tourism economic impacts via regional tourism newsletter	<u>Primary:</u> Eastern Shore of Virginia Tourism Commission <u>Secondary:</u> Virginia Tourism Corporation Advocacy Team	Kerry Allison (Eastern Shore of Virginia Tourism Commission)	Short Term and Ongoing	December 2017 and ongoing	Report to all local government elected officials and staff on Eastern Shore tourism impacts and activities via regularly distributed regional tourism newsletter	Complete for 2016, 2017 and ongoing
Host at least 1 familiarization tour for local government officials each year	<u>Primary:</u> Eastern Shore of Virginia Tourism Commission <u>Secondary:</u> Eastern Shore Public Library	Steve Potts (Eastern Shore of Virginia Tourism Commission)	Short Term and Ongoing	May (Annually)	Invite and encourage all local government elected officials and at least 2 members of each government staff participate annually; fold into Eastern Shore of Virginia Tourism Commission annual May meeting.	Complete for 2016, 2017 and ongoing

Objective B: Increase tourism marketing and tourism budget.

Increase tourism related tax revenues by 5% per year for the next 5 years.	<u>Primary:</u> Eastern Shore of Virginia Tourism Commission <u>Secondary:</u> County and town government officials	Steve Potts (Eastern Shore of Virginia Tourism Commission)	Short/ Mid/ Long Term	January 2017-2022	Total tax revenues will increase from 2017 baseline for tourism by 25% by 2022. - Chincoteague Meals Tax increased 12.5% during 2015-2017	Transient Occupancy Tax revenues have increased, but 2017 baseline unknown
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APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

Encourage new business formation that brings new tax revenues to the regional tourism economy	<u>Primary:</u> County and Town leaders <u>Secondary:</u> Accomack-Northampton Planning District Commission	County and Town Economic Development Representatives	Long Term	January 2020	One Eastern Shore of Virginia town participates in the Virginia Department of Housing & Community Development's Main Street program; Region participates in the Virginia Department of Housing & Community Development's Entrepreneurial Challenge program for high school students	Main Street Program – Complete (Cape Charles) Virginia Entrepreneurial Challenge – no participation in 2016 Other: CBDG Downtown Revitalization Projects (Parksley underway and Onancock initial discussions held)
Designate region as a "Tourism Enterprise Zone" to facilitate significant investment of \$50 million in tourism-related projects	<u>Primary:</u> Virginia Tourism Corporation, Accomack-Northampton Planning District Commission, County and Town officials	Staci Martin (Virginia Tourism Corporation), Curt Smith (Accomack-Northampton Planning District Commission)	Long Term	January 2022	Major investment in strategic tourism product	Ongoing - Initial discussions held but next steps not identified

GOAL 4: Grow the Arts Industry into a Primary Economic Driver for the region by 2022.

The region has an exceptional track record of successful entrepreneurs growing art and artisan businesses to employ hundreds. Resources exist to assist existing and start-up art businesses but need expansion to fully capitalize on this opportunity.

Objective A: Drive scalable artisan business growth for existing businesses and start-ups with a goal to create 50 new artisan jobs and 5 new businesses from a baseline of 2018.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status (As of Nov.2017)
Develop an art apprenticeship or internship workshop to teach business owners interested in significantly growing their business essential skills outside of general management skills (i.e. marketing/branding, scaling,	<u>Primary:</u> To Be Determined <u>Secondary:</u> Accomack-Northampton Planning District Commission, Eastern Shore Community College, Hampton Roads Small Business	Sara Baldwin (Accomack-Northampton Economic Development Committee)	Short Term	March 2018	Conduct meeting to have exploratory discussion. Refine objective and identify key stakeholders.	Not started
			Short Term	April 2018	Develop strategic plan for establishing apprenticeship/internship workshop.	Not started
		Mid Term	December 2018	Conduct inventory to establish 2018 baseline for number of scalable artisan production jobs and number of existing businesses	Not started	

APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

systemizing, etc.)	Development Center, Others (To Be Determined)	Sara Baldwin (Accomack-Northampton Economic Development Committee)	Mid Term	February 2019	Initiate apprenticeship/internship workshop	Not started
			Long Term	November 2022	Have 10 business owners complete workshop with 5 businesses creating a total of 50 new jobs.	Not started
Objective B: Grow regional artisan and artist opportunities by establishing one program that provides additional recognition by 2019.						
Establish a Regional Artisan Champion Competition to provide additional marketing capacity for artisans and encourage growth in number of artisans.	<i>Primary:</i> Eastern Shore's Own Art Center <i>Secondary:</i> Arts Council of the Eastern Shore, Artisan Trail Management Team of the Eastern Shore of Virginia, Eastern Shore Art League	Ashleigh Smith Maggard (Eastern Shore's Own Art Center)	Short Term	March 2018	Conduct meeting to have exploratory discussion. Refine objective and identify key stakeholders.	Not started
			Short Term	June 2018	Develop competition guidelines and identify artisans to invite to competition	Not started
Hold first Regional Artisan Champion Competition and establish long-term operational and management plan for continuity.	<i>Primary:</i> Eastern Shore's Own Art Center <i>Secondary:</i> Arts Council of the Eastern Shore, Artisan Trail Management Team of the Eastern Shore of Virginia, Eastern Shore Art League	Ashleigh Smith Maggard (Eastern Shore's Own Art Center)	Mid Term	December 2018	Schedule initial competition and have commitments in place for artisans	Not started

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GOAL 5: Develop recreational facilities and opportunities to better serve local residents and employees and attract prospective visitors and residents.

Construct recreational facilities and opportunities to enhance the overall health and quality of life for working families and individuals. The region currently ranks among the lowest in the Commonwealth according to multiple health metrics. Facilities including recreational-focused buildings, parks, and trails would be developed by 2022.

Objective A: Develop a regional network of pedestrian facilities by increasing the number of trails, sidewalks, road shoulders, and crosswalks.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status (As of Nov.2017)
Construct and promote a regional bicycle trail.	<p><i>Primary:</i> Accomack-Northampton Transportation Technical Advisory Committee</p> <p><i>Secondary:</i> Accomack-Northampton Planning District Commission, Virginia Department of Transportation</p>	Accomack-Northampton Transportation Technical Advisory Committee Members, Curtis Smith (Accomack-Northampton Planning District Commission)	Short Term	July 2018	Update the regional Bicycle Plan – policy decisions regarding establishing bike routes on low-volume secondary roads awaiting from VDOT. Bay Coast and ANEC initial discussions regarding use of right of way held. Regional sidewalk inventory completed.	Underway
			Mid Term	July 2019	Construct local trails within highest priority areas. <ul style="list-style-type: none"> Southern Tip trail - feasibility study to be completed Fall 2018 Cape Charles biking and pedestrian trail – 1.5 miles complete to date with plans to expand and connect to regional trail Assateague/Chincoteague trail - planning during 2018 Onancock/Onley trail – initial discussions held with property owners and town representatives. Discussions held regarding options for facilities along Market Street 	Underway
			Long Term	2020	Identify and pursue funding to construct connections between existing trails	Ongoing

APPENDIX E: EASTERN SHORE REGIONAL PLAN OF ACTION: ARTS, ENTERTAINMENT, RECREATION & VISITOR INDUSTRIES

Objective B: Increase recreational non-motorized boat use for residents and visitors.

Enhance and promote existing water trails.	<p><u>Primary:</u> Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Eastern Shore of Virginia Tourism Commission</p>	Shannon Alexander (Accomack-Northampton Planning District Commission)	Short to Mid Term	October 2018	<ul style="list-style-type: none"> •Update Seaside Water Trail documents and website. •Establish Eastern Shore water trail brand •Integrate water trail with the Virginia Oyster Trail •Incorporate local businesses as stops along water trail 	Underway – draft ESVA water trail brand completed and Seaside Water Trail update started
Establish and promote new water trails	<p><u>Primary:</u> Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Eastern Shore of Virginia Tourism Commission</p>	Shannon Alexander (Accomack-Northampton Planning District Commission)	Mid to Long Term	October 2019	<ul style="list-style-type: none"> •Create water trails for selected Bayside creeks •Incorporate local businesses as stops along water trail •Integrate new trails with Captain John Smith National Historic Water Trail and Eastern Shore water trail brand 	Bayside Water Trails development to begin during 2019 following completed update to Seaside Water Trail

APPENDIX F: EASTERN SHORE REGIONAL PLAN OF ACTION: FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

GOAL 1: Build an entrepreneurship culture within the region by 2020.

Research shows that poor rural economies do best by growing local talent and business opportunities. Successful communities attract outside investment—not the reverse. The Eastern Shore needs to end the population loss and lack of opportunity for its educated youth to live and work in the region.

Objective A: Create an “Economic Think Tank” for the Eastern Shore during 2018.

The Eastern Shore needs a single central entity to understand and promote the region’s economic goals.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Create and maintain a customized regional data dashboard to publish all action plan metrics on the A-NPDC Economic Development website	<u>Primary:</u> Accomack-Northampton Planning District Commission <u>Secondary:</u> Accomack-Northampton Economic Development Committee and Subcommittee Members	Curtis Smith (Accomack-Northampton Planning District Commission)	Short Term	April 2018	Ensure that all Goals, Objectives, and Strategies have incorporated metrics	Projects reviewed, but not all have been updated to include proper metrics
			Short Term	June 2018	Present draft updates to Economic Development Committee for adoption	Ongoing
			Mid Term	August 2018	Create dashboard and publish initial metrics	Tableau software purchased (Nov. 2017)
			Long Term	Ongoing Semi-annually	Update metrics on a semi-annual basis including any changes to action plans	Not started
Think Tank Subcommittee holds initial meeting	<u>Primary:</u> Accomack-Northampton Economic Development Think Tank Subcommittee Members <u>Secondary:</u> Accomack-Northampton Planning District Commission	Ava Gabrielle-Wise (Accomack-Northampton Economic Development Committee), Curtis Smith (Accomack-Northampton Planning District Commission)	Short Term	January 2018	Subcommittee created by vote. Members identified and committed	Meeting not held as of April 2018
Think Tank Subcommittee reviews action items and harvests economic data to support existing and potential action plans goals, objectives, and strategies by making data available to project leaders	<u>Primary:</u> Accomack-Northampton Economic Development Think Tank Subcommittee Members <u>Secondary:</u> Accomack-Northampton Planning District Commission	Ava Gabrielle-Wise (Accomack-Northampton Economic Development Committee), Curtis Smith (Accomack-Northampton Planning District Commission)	Mid-Long Term	Ongoing Semi-annually	Subcommittee meets semi-annually between full Economic Development Committee and four industry sector Subcommittee meetings.	Not started

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Objective B: Expand the awareness of entrepreneurship opportunities to increase successful startups.

Research by the Darden School shows the rural areas that develop their entrepreneurial base the best are the most successful in growing their economy against declining trends.

Host entrepreneurship educational discussions each year.	<p><u>Primary:</u> Accomack-Northampton Planning District Commission, Eastern Shore of Virginia Chamber of Commerce</p> <p><u>Secondary:</u> Eastern Shore Community College</p>	Joe Betit (Accomack-Northampton Economic Development Committee), Curt Smith (Accomack-Northampton Planning District Commission), Robie Marsh (Eastern Shore of Virginia Chamber of Commerce)	Short Term and On-going	Annually by November of each year	<ul style="list-style-type: none"> • At least 2 sessions per year • Goal of attendance at least 8 members per session • At least one attendee per session begins operation 	For 2016: Complete For 2017: Incomplete (No free public sessions held) For 2018: Complete (Entrepreneurship Summit II; NASA Space Apps Challenge; ESCC paid series)
Advertise and expand reach of local investment funds	<p><u>Primary:</u> Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Shore Growth Ventures, Accomack County Economic Development Authority, Northampton County Joint Industrial Development Authority</p>	Curtis Smith (Accomack-Northampton Planning District Commission)	Short Term	March 2018	Develop a summary publication of funds available & firms funded and promote in local media, on county and regional economic web sites and chambers	Started October 2017; Working group developing draft (Spring 2018)
		Elaine Meil (Accomack-Northampton Planning District Commission), Pat Coady (Shore Growth Ventures)	Short Term and On-going	February 2019	<p>Manage and promote utilization of available local investment funds</p> <ul style="list-style-type: none"> • Shore Growth Ventures: Raised \$85,000 and funded Neubeam startup • ESVA Economic Development Revolving Loan Fund: – 2 existing with additional offer made but not accepted by applicant 	Ongoing; No update for April 2018

APPENDIX F: EASTERN SHORE REGIONAL PLAN OF ACTION: FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

Objective C: Create “incubator” for new businesses.

The Eastern Shore needs readily available infrastructure to support startups and new re-locators. Startups need experienced professional support they may not have or be able to afford at critical points.

Select the physical location(s) for incubator.	<p><u>Primary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority, Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Eastern Shore Public Library, Eastern Shore of Virginia Chamber of Commerce, Eastern Shore Community College</p>	Charles Kolakowski (Northampton County), Rich Morrison (Accomack County), Curt Smith (Accomack-Northampton Planning District Commission)	Short Term	May 2018	At least one location selected	No publicly owned & managed option identified to date. Potential for small-scale facility in Melfa but no progress to date. No update for April 2018
Mentoring professionals in subject matter areas i.e. law, technology marketing, contracts, human resources, & accounting	<p><u>Primary:</u> Shore Growth Ventures, Hampton Roads Small Business Development Center</p> <p><u>Secondary:</u> Eastern Shore Community College, Eastern Shore of Virginia Chamber of Commerce</p>	Ron Matthews (Shore Growth Ventures), Joe Betit (Accomack-Northampton Economic Development Committee), George Bryan (Small Business Development Center)	Mid Term	2018	<ul style="list-style-type: none"> • Number of companies & individuals mentored • Number of mentors committed and in which fields 	Ongoing - No update for April 2018
Develop selected location as incubator	<p><u>Primary:</u> Accomack-Northampton Planning District Commission</p>	Elaine Meil (Accomack-Northampton Planning District Commission)	Mid/Long Term	Dec 2019	Develop the incubator and installation of first company. May be public or privately-owned/managed incubator.	Pending completion of incubator type and location.

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GOAL 2: Increase access to funding for entrepreneurial and Eastern Shore small business efforts to improve our economy.

Banks are basically forbidden to fund startups. Most new businesses fail within five years. Lack of capital resources at critical junctures is a main reason for failure.

Objective A: Develop financing sources to support Regional Economic Development Plan (SET/CEDS) Goals.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Document & attract sources of funding	<p><u>Primary:</u> Accomack-Northampton Planning District Commission, Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority, Financial Solutions</p> <p><u>Secondary:</u> Shore Growth Ventures</p>	Curtis Smith (Accomack-Northampton Planning District Commission), Charles Kolakowski (Northampton County), Rich Morrison (Accomack County), John Fiege (Financial Solutions, Ltd.)	Short Term	January 2018	Develop consolidated document with potential financing sources for Regional Economic Development Plan goals.	Under Development
			Short to Mid Term	June 2018	Identify unique funding source and strategy for all Regional Economic Development Plan goals eligible for state or federal grant or loan funding.	Some projects connected to funding source, but not all
			Mid Term	January 2019	<ul style="list-style-type: none"> • Achieve \$500k in revolving loan funds • Build to \$2M in available investing funds 	Need to determine baseline of available loan funds and understand totals for public vs. private available
Provide financing that supports objectives of the Regional Economic Development Plan	<p><u>Primary:</u> Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority, Shore Growth Ventures, Financial Solutions</p>	Curtis Smith (Accomack-Northampton Planning District Commission), Charles Kolakowski (Northampton County), Rich Morrison (Accomack County), Pat Coady (Shore Growth Ventures), John Fiege (Financial Solutions, Ltd.)	Mid Term	January 2019	Target loan funds to businesses locating in the incubator and support financing needs of other Regional Economic Development Plan Goals. Make one loan to an organization or new business participating or partnering in the regional economic development planning process	Private funds: first loan repaid (Shore Growth Ventures)

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Determine methods of distribution of funds, meeting funders' requirements	<u>Primary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority <u>Secondary:</u> Shore Growth Ventures, Accomack-Northampton Planning District Commission	Charles Kolakowski (Northampton County), Rich Morrison (Accomack County), Pat Coady (Shore Growth Ventures)	Short Term	May 2018	Designate three agencies to distribute funds: two public and one private	Not started
Determine criteria for awarding funding	<u>Primary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority <u>Secondary:</u> Shore Growth Ventures, Accomack-Northampton Planning District Commission	Northampton County Economic Development Representative, Rich Morrison (Accomack County), Pat Coady (Shore Growth Ventures)	Short Term	May 2018	Business case ability to meet goals repay loans or credible investment	Not started
Establish due diligence/support/compliance committees	<u>Primary:</u> Shore Growth Ventures <u>Secondary:</u> Accomack-Northampton Planning District Commission	Ron Matthews (Shore Growth Ventures)	Short Term	March 2018	Ensure compliance with requirements and decrease failure rate < 30% compared to baseline of 2016 rate	Started but not complete

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Objective B: Attract companies, particularly small and start-up, to the region with incentives and credits to make the Eastern Shore more attractive.

Provide a central source for complete listing of federal, state, local, and private incentives and credits available to new firms.

Document and advertise all federal, state, and local incentives available	<p><u>Primary:</u> Accomack-Northampton Planning District Commission, Shore Growth Ventures</p> <p><u>Secondary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority</p>	Curtis Smith (Accomack-Northampton Planning District Commission), Pat Coady (Shore Growth Ventures), Julie Wheatley (Accomack County)	Short Term	March 2018	<ul style="list-style-type: none"> Place 4 advertisements in local media Advertise incentives on pertinent local web sites Publish documents of incentives 	Started – initial list of resources developed and currently being populated further before publishing
Document credits available to specific sectors for locating on the Shore	<p><u>Primary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority</p> <p><u>Secondary:</u> Accomack-Northampton Economic Development Subcommittee Partners</p>	Charles Kolakowski (Northampton County), Rich Morrison (Accomack County)	Short Term and Ongoing	March 2018 & semi-annual thereafter	10 sector specific reports of credits available at Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority and economic development offices	Not started
Provide contacts to assist in obtaining such incentives and credits	<p><u>Primary:</u> Accomack-Northampton Planning District Commission, Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority</p> <p><u>Secondary:</u> Accomack-Northampton Economic Development Subcommittee Partners</p>	Curtis Smith (Accomack-Northampton Planning District Commission), Charles Kolakowski (Northampton County), Rich Morrison (Accomack County)	Short/Mid Term	January 2018	One contact list distributed to all related and relevant parties and in information packet for prospective companies	Not started

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Create concentration of efforts on attracting firms related to Wallops activities and opportunities	<u>Primary:</u> Wallops Research Park <u>Secondary:</u> Accomack-Northampton Economic Development Industry Sector Subcommittee Partners	Julie Wheatley (Accomack County)	Short/ Mid Term	December 2017	<ul style="list-style-type: none"> • 4 firms exploring location at or in conjunction with Wallops work • 1 new firm committed on location 	Ongoing – No update for April 2018
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GOAL 3: Increase market and value-add opportunities for Eastern Shore products and providers.

Most of the Shore production in Agriculture and Aquaculture is sold offshore and wholesale. Most value added to those products is also done offshore, often providing greater margin than received by the producers. Building our economy on our production strengths and keeping more of the sales and tax dollars home will build our employment and our community. To increase our market and profitability and to capture more dollars from our sizable “pass through” traffic, it is important to provide our producers more market visibility and ways to improve their profitability. The anticipated outcome is improved margins for our producers and increased sales and tax dollars for our producers and communities.

Objective A: Create an attractive and compelling convention center and market location for sales of Eastern Shore products on U.S. Route 13.

The Shore produces significant agriculture and aquaculture products and has significant artisans and crafts. There is a need to increase retail (taxable) sales of the former and to increase the visibility and further develop the market for the latter.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Feasibility study of current and potential products for sale	<u>Primary:</u> Accomack-Northampton Planning District Commission <u>Secondary:</u> Foundational & Entrepreneurship Development Working Group Partners; Seafood, farm and craft organizations	Curtis Smith (Accomack-Northampton Planning District Commission); Sara Baldwin; Richard Williams	Short Term	December 2017	Submit study to Accomack-Northampton Economic Development Committee <ul style="list-style-type: none"> • April 2018 – Inventory of artisan and agricultural goods started. Additional work necessary to refine study. 	Ongoing – potential presentation to EDC in December 2018

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Examine Business Case for Market and Convention Center	<p><u>Primary:</u> Accomack-Northampton Economic Development Committee, Accomack-Northampton Planning District Commission, Shore Growth Ventures, Eastern Shore of Virginia Tourism Commission</p> <p><u>Secondary:</u> Foundational & Entrepreneurship Development Working Group Partners</p>	Curtis Smith (Accomack-Northampton Planning District Commission), Pat Coady (Shore Growth Ventures), Kerry Allision (Eastern Shore of Virginia Tourism Commission)	Mid Term	March 2018	Recommendation of go/no-go on business case to Accomack-Northampton Economic Development Committee	Ongoing – marketplace development currently focusing on privately-led efforts
Obtain funding for initial construction	<p><u>Primary:</u> Accomack-Northampton Planning District Commission</p> <p><u>Secondary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority, Vending organizations</p>	Curtis Smith (Accomack-Northampton Planning District Commission)	Mid to Long Term	November 2019	\$2 M in initial funding committed if decision is a go	Not started

GOAL 4: Develop affordable and reliable infrastructure to facilitate Eastern Shore businesses.

The Shore has a major advantage compared to similar rural areas in having an outstanding fiber-based Internet service structure. The need exists to extend high quality broadband beyond U.S. Route 13, the rail corridor, and the towns to reach nearly all small businesses and residences. Water, Sewer, and Power are always considerations for any new entrant.

Objective A: Make broadband (25 Mbps down & 4 Mbps up) available to all businesses and 80% of residences by 2025.

Strategy	Responsibility	Key Contact	Timeline		Activity Outcome/Output Measurements	Progress Status
Further fiber construction to bring all mainland areas within reach (second phase)	<p><u>Primary:</u> Eastern Shore of Virginia Broadband Authority Board</p>	Eastern Shore of Virginia Broadband Authority members and staff	Long Term	Mar. 2018	\$10-12 M in bonds and other funds issued for buildout. Capital Improvement Plan complete.	Not started

APPENDIX F: EASTERN SHORE REGIONAL PLAN OF ACTION: FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

Fiber to the premises on existing lines for 20% of residents	<i>Primary:</i> Eastern Shore of Virginia Broadband Authority	Robert Bridgham (Eastern Shore of Virginia Broadband Authority)	Long Term	Nov. 2020	20% of all addresses have access. 7% have connected and taken a service package to date.	2017/2018 -Funded 7 lines of 24 with 3 already open as of November 2017. No update for April 2018. 2019 – 7 more planned. 2020 – 7 more planned.
Grants, loans, and private investment to extend broadband service to residents	<i>Primary:</i> Declaration Networks Group, Eastern Shore Communications	Barry Toser (Declaration Networks Group), Ronald van Geijn (Eastern Shore Communications)	Short Term	Mar. 2018	2 new grants obtained for last mile service	Grants are submitted with many regional partners. Awaiting decision. No update for April 2018.
			Long Term	Dec. 2019	4 new grants obtained for last mile service	Private companies are partnering together and with public entities for grants and goals. No update for April 2018.
Continue to apply for grants and loans to extend footprint	<i>Primary:</i> Eastern Shore of Virginia Broadband Authority <i>Secondary:</i> Accomack-Northampton Planning District Commission	Eastern Shore of Virginia Broadband Authority members and staff	Short Term	Jan. 2018	2 new broadband grants obtained	Not started
Explore further co-operation with the Accomack-Northampton Electric Cooperative	<i>Primary:</i> Eastern Shore of Virginia Broadband Authority, Accomack-Northampton Electric Cooperative	Eastern Shore of Virginia Broadband Authority members, Kelvin Pettit (Accomack-Northampton Electric Cooperative)	Short Term	Dec. 2018	Agreement on future projects together <ul style="list-style-type: none"> • Pole attachment agreement • Additional low cost/no cost attachment agreement • Joint construction project 	Not started. Unknown if ANEC is willing to cooperate due to security and other limitations. No update for April 2018.
Objective B: Plan commercial/industrial concentrations for future development together with methods of providing water and sewage.						
Examine and modify where necessary, zoning codes to place likely sites closer to existing water and sewer as feasible	<i>Primary:</i> Northampton County, Accomack County <i>Secondary:</i> Northampton & Accomack County Boards of Supervisors	Charles Kolakowski (Northampton County), Rich Morrison (Accomack County)	Short Term	June 2018	2 zoning codes modified to facilitate new venture locations near existing water and sewer	Northampton Co. Comp Plan update underway with additional progress anticipated for 2018. Accomack Co. Comp Plan update underway

APPENDIX F: EASTERN SHORE REGIONAL PLAN OF ACTION: FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

Work with water and sewer providers to expand locations for commercial and industrial development.	<u>Primary:</u> Northampton & Accomack County Economic Development Officials, Existing Water & Sewer Providers	Charles Kolakowski (Northampton County), Rich Morrison (Accomack County), Town Officials	Short/ Mid Term and ongoing	June. 2018	<ul style="list-style-type: none"> • Agreements reached with 2 town sewage plants for additional hookup terms. • Agreement with two well owners on terms for additional hookups for commercial service 	Congressman Taylor Town Infrastructure summit held in April 2018 identified water/sewer expansion as top priority. Additional meetings being held among towns to explore opportunities for federal rural infrastructure funding.
Market existing locations for business development.	<u>Primary:</u> Northampton & Accomack County Economic Development Officials <u>Secondary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority	Charles Kolakowski (Northampton County), Rich Morrison (Accomack County)	Long Term	Dec. 2018	4 new firms attracted	Underway and ongoing
Objective C: Coordinate with the Accomack-Northampton Electric Cooperative to provide reliable cost-effective “smart” power from both renewable and traditional sources.						
Encourage new generation rapid start fill-in power (peaker plants)	<u>Primary:</u> Northampton & Accomack County Economic Development Officials <u>Secondary:</u> Accomack-Northampton Electric Cooperative	Charles Kolakowski (Northampton County), Rich Morrison (Accomack County)	Mid Term	Dec. 2019	One new “peaker” plant capable of offsetting existing solar capacity	Ongoing, Not Complete. No update for April 2018.

APPENDIX F: EASTERN SHORE REGIONAL PLAN OF ACTION: FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

Become an attractive test site for power grid scale power storage	<u>Primary:</u> Northampton & Accomack County Economic Development Officials, Wallops Research Park <u>Secondary:</u> Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority	Charles Kolakowski (Northampton County), Rich Morrison & Julie Wheatley (Accomack County)	Long Term	Dec. 2019	One firm committed to locating test plant on Eastern Shore	Not started
Extend natural gas pipeline from Maryland to meet needs of local businesses.	<u>Primary:</u> Accomack County Economic Development Officials <u>Secondary:</u> Accomack - Northampton Planning District Commission, Northampton County Economic Development Officials	Rich Morrison (Accomack County)	Mid Term	Dec. 2018	Facilitate extension of natural gas pipeline from Maryland to Accomack County	Ongoing. Extension project currently in open season.
		Rich Morrison (Accomack County)	Long Term	2020	Extend pipeline further to major employers	Not started

Objective D: Coordinate with local transportation agencies to ensure adequate and reliable transportation infrastructure for local businesses.

Maintain the railroad and explore potential opportunities for expanded/restored usage.	<u>Primary:</u> Bay Coast Railroad, Northampton County Joint Industrial Development Authority, Accomack County Economic Development Authority <u>Secondary:</u> Accomack-Northampton Planning District Commission	Northampton and Accomack County Economic Development Officials	Short Term	Dec. 2017	Explore potential opportunities for new or existing businesses to restore or expand use of railroad.	Started. No update for Nov. 2017 or April 2018
			Mid Term	Jan. 2020	Make improvements by 2020 including cross ties, surfacing, lining, culverts and ballasting the track.	Ongoing, not complete. No update for April 2018.

APPENDIX F: EASTERN SHORE REGIONAL PLAN OF ACTION: FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

Protect, preserve, and enhance working waterfronts by implementing the recommendations included in the Eastern Shore Chapter of the Virginia Working Waterfronts Master Plan	<u>Primary:</u> Accomack-Northampton Planning District Commission <u>Secondary:</u> Accomack County, Northampton County, waterfront towns	Curtis Smith (Accomack-Northampton Planning District Commission)	Long Term	Dec. 2020	Implement all recommended items in the Eastern Shore Chapter of the Virginia Working Waterfronts Master Plan	Ongoing: 2018 VA General Assembly: Creation & Funding for Waterway Maintenance Fund & various other working waterfront-supportive legislation
Ensure regional navigable waterways are of adequate depth to support existing and new businesses and users	<u>Primary:</u> Eastern Shore of Virginia Regional Navigable Waterways Committee <u>Secondary:</u> Accomack-Northampton Planning District Commission	John Joeckel (Eastern Shore of Virginia Regional Navigable Waterways Committee), Curtis Smith and Shannon Alexander (Accomack-Northampton Planning District Commission)	Short to Mid Term	June 2018	Complete a U.S. Planning Assistance to States Shallow Draft Navigation and Sediment Management Plan for local federally-designated waterways. To include a complete economic impact assessment of water-dependent businesses for local waterways. <ul style="list-style-type: none"> Nov. 2017 – Application submitted. Awaiting approval from US Army Corps for study to begin. April 2018 – project not approved in adequate time resulting in cancellation. 	Delayed - Additional funds now necessary to attempt project again.
			Mid Term	Mar. 2019	Complete strategic funding plan for dredging of non-federally-designated waterways. <ul style="list-style-type: none"> Nov. 2017 – Started. Partnering with Middle Peninsula and Northern Neck to develop policy and funding mechanisms. April 2018 – Ongoing. 2018 VA General Assembly success with creation and funding for VA Waterway Maintenance Fund 	Ongoing
			Long Term	Mar. 2022	<ul style="list-style-type: none"> Complete dredging of at least 5 dredging projects for federally-designated waterways with each considering alternative beneficial uses of dredge spoils. Complete dredging of at least 3 dredging projects for non-federally-designated waterways 	Ongoing. Alternative beneficial use being planned for Wachapreague area and alternative beneficial use study for Tangier awaiting funding
Identify current and future pedestrian use areas for communities and local businesses and implement actions to ensure safe and adequate pedestrian facilities	<u>Primary:</u> Accomack-Northampton Transportation Technical Advisory Committee <u>Secondary:</u> Accomack-Northampton	Accomack-Northampton Transportation Technical Advisory Committee Members, Curtis Smith (Accomack-Northampton Planning District	Mid Term	June 2019	<ul style="list-style-type: none"> Prioritize and develop strategic financing plan (implementation plan) for pedestrian safety improvements in high volume corridors. 	Working with VDOT regarding cost-effective signage for designated pedestrian routes on lowest volume roads.

APPENDIX F: EASTERN SHORE REGIONAL PLAN OF ACTION: FOUNDATIONAL & ENTREPRENEURSHIP DEVELOPMENT

	Planning District Commission, Virginia Department of Transportation	Commission), Chris Isdell (Virginia Department of Transportation)	Mid to Long Term	2022	Acquire necessary funding and implement pedestrian safety improvements of high priority areas.	Not started
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APPENDIX G: COMPLETED ECONOMIC DEVELOPMENT GOALS & OBJECTIVES

COMPLETED ECONOMIC DEVELOPMENT GOALS & OBJECTIVES

A Comprehensive List of Successfully Implemented Economic Development Projects Dating to the 2012 Comprehensive Economic Development Strategy

Aerospace & Defense Sector

Goal/Objective	Plan Location (Year)	Date Completed
Partner with other regions within the Commonwealth to provide comprehensive end to end government and commercial unmanned systems capabilities	SET (2016) – Goal 2, Obj A	2017 & ongoing
Attract commercial UAS companies for short term and permanent tenant status	SET (2016) – Goal 2, Obj B	2017 & ongoing
Cultivate a payload pipeline “Students & Startups” – initiated with current plans for continued growth	SET (2016) – Goal 1, Obj E	2016-2017 & ongoing
Accomack County secures \$4 million in state funding for the taxiway into the Wallops Research Park	CEDS (2012)	2013
Accomack County completes additional steps to remove federal deed restriction on County land at WRP	CEDS (2012)	2013
Accomack County Board approves \$4 million to finance WRP infrastructure.	CEDS (2012)	2013

Agribusiness & Food Processing Sector

Goal/Objective	Plan Location (Year)	Date Completed
Survey towns for possible establishment of additional local farm markets.	Reg. Econ. Dev. Plan (2017) – Goal 1, Obj. B	2018
Assess regional production capacity for development of wholesale production facility to support large-scale farmers to add value to local crops and create new opportunities	SET (2016) – Goal 2, Obj A	2017
Assess market potential for development of wholesale production facility to support large-scale farmers to add value to local crops and create new opportunities	SET (2016) – Goal 2, Obj B	2017

Arts, Entertainment, Recreation & Visitor Industries Sector

Goal/Objective	Plan Location (Year)	Date Completed
Conduct submarket strategic planning sessions in primary tourism communities (Chincoteague, Parksley, Onancock, Cape Charles, Wachapreague, Exmore, Saxis, Eastville, Tangier) to identify submarket-specific strategies, both geographic and activity based, including boutique travel niche markets in each community.	Reg. Econ. Dev. Plan (2017) – Goal 1, Obj. A	2018
Educate local government officials on the economic impact of regional tourism.	SET (2016) – Goal 3, Obj A	2017 & ongoing

Foundational & Entrepreneurship Development Sector

Goal/Objective	Plan Location (Year)	Date Completed
Complete regional survey of current pedestrian use areas and present findings to relevant stakeholders. (Report available here)	Reg. Econ. Dev. Plan (2017) – Goal 1, Obj. A	2018
Accomack-Northampton Economic Development Committee Establishes Subcommittee to serve as “Think Tank” and identifies initial members	Reg. Econ. Dev. Plan (2017) – Goal 1, Obj. A	2017
Deepen Cape Charles Harbor and Natural Channel	CEDS (2012)	2014-2015

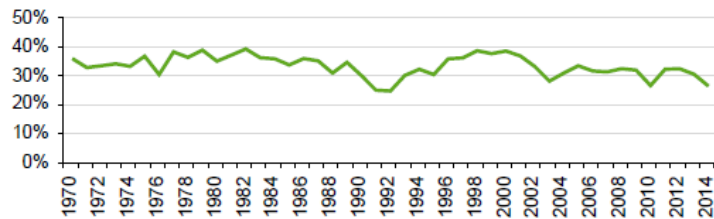
APPENDIX H: AGRIBUSINESS & FOOD PROCESSING CLUSTER DATA

Source: Headwaters Economics/Economic Profile System (EPS) (January 2015)

Farm Employment

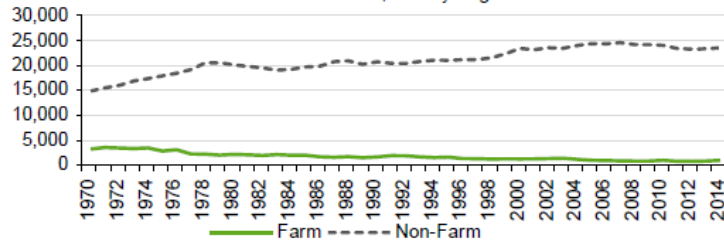
- In 1970, farm proprietors represented 36 percent of all farm employment. By 2014, farm proprietors represented 26.5 percent of all farm employment.

Farm Proprietors as a Percent of Farm Jobs, County Region



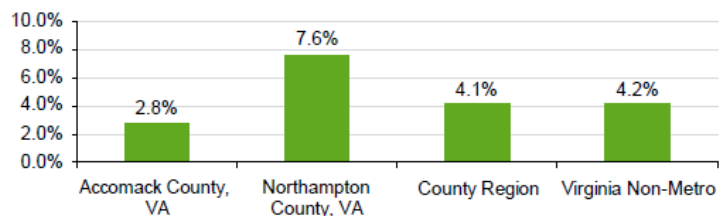
- From 1970 to 2014, farm employment shrank from 3,295 to 1,017 jobs, a 69.1 percent decrease.

Farm and Non-Farm Jobs, County Region



- From 1970 to 2014, non-farm employment grew from 14,885 to 23,553 jobs, a 58.2 percent increase.

Farm Jobs as a Percent of Total Employment, 2014



- In 2014, Northampton County, VA had the largest percent of total farm employment (7.63%), and Accomack County, VA had the smallest (2.8%).

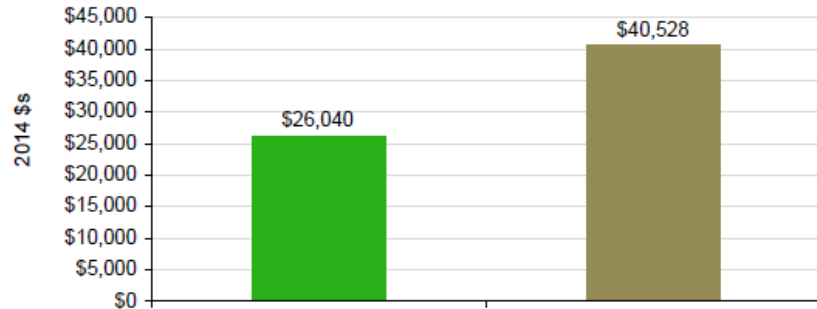
Information on Farm Worker Skills Bureau of Labor Statistics:
<http://www.bls.gov/oes/current/oes452092.htm>

How do farm jobs and wages compare?

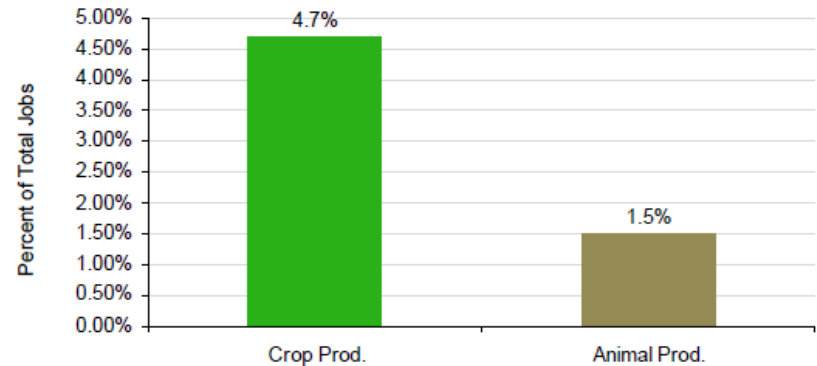
This page describes average wages (in real terms) and employment levels in crop and animal production. It also shows average wage trends (in real terms) for these farm sectors.

Avg. Annual Wages & Percent of Total Employment in Crop & Animal Production, County Region, 2014

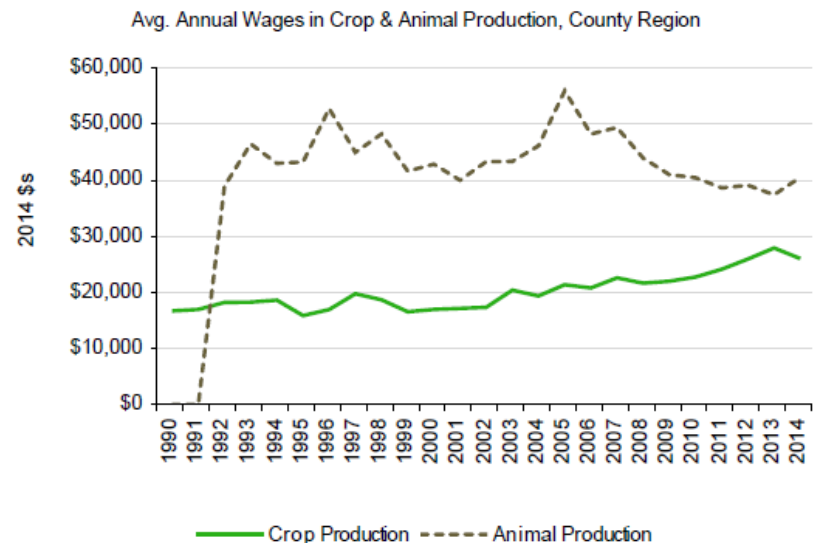
- In 2014, average annual wages in crop production were \$26,040 and average annual wages in animal production were \$40,528.



- In 2014, crop production jobs were 4.7 percent of total employment and animal production jobs were 1.5 percent of total employment.



- From 1990 to 2014, average annual wages in crop production grew from \$16,694 to \$26,040, a 56 percent increase.



Data Sources: U.S. Department of Labor. 2015. Bureau of Labor Statistics, Quarterly Census of Employment and Wages, Washington, D.C.

Average Annual Wages, 2014 (2014 \$s)

	Accomack County, VA	Northampton County, VA	County Region	Virginia Non-Metro
Total Private & Public	\$34,360	\$30,884	\$33,367	\$34,905
Total Private	\$31,610	\$29,878	\$31,099	\$33,864
Farm	\$40,562	\$27,155	\$29,514	\$30,195
Crop Production	\$48,002	\$22,738	\$26,040	\$28,640
Animal Production	\$30,908	\$45,043	\$40,528	\$33,540
Non-Farm	\$30,804	\$28,146	\$30,200	\$31,763

This table shows wage data from the Bureau of Labor Statistics, which does not report data for proprietors or the value of benefits and uses slightly different industry categories than those shown on previous pages of this report.

Economic Impacts

Source: The Economic Impacts of Agriculture and Forest Industries in Virginia.
Terance J. Rephann, Ph.D. (June 2013).

Direct and Total Economic Impacts of Virginia Agriculture and Forestry-related Industries by Locality, Output 2011 (\$ Millions)

Locality	Agriculture		Forestry		Agriculture & Forestry	
	Direct	Total	Direct	Total	Direct	Total
Accomack	861.9	998.4	3.3	4.1	865.2	1,002.5
Northampton	145.9	174.9	3.4	4.5	149.3	179.4

Direct and Total Economic Impacts of Virginia Agriculture and Forestry-related Industries by Locality, Employment 2011 (\$ Millions)

Locality	Agriculture		Forestry		Agriculture & Forestry	
	Direct	Total	Direct	Total	Direct	Total
Accomack	4,142	5,372	23	29	4,165	5,401
Northampton	917	1,176	17	26	934	1,202

Direct and Total Economic Impacts of Virginia Agriculture and Forestry-related Industries by Locality, Value-added 2011 (\$ Millions)

Locality	Agriculture		Forestry		Agriculture & Forestry	
	Direct	Total	Direct	Total	Direct	Total
Accomack	168.6	257.8	1.4	1.8	169.9	259.6
Northampton	60.3	81.6	1.5	2.2	61.9	83.8

Direct and Total Economic Impacts of Virginia Agriculture and Forestry-related Industries by Locality, Output 2015 (\$ Millions)

Locality	Agriculture		Forestry		Agriculture & Forestry	
	Direct	Total	Direct	Total	Direct	Total
Accomack	915.8	1060.9	3.5	4.4	919.3	1065.2
Northampton	155	185.8	3.6	4.8	158.6	190.6

Direct and Total Economic Impacts of Virginia Agriculture and Forestry-related Industries by Locality, Value-added 2015 (\$ Millions)

Locality	Agriculture		Forestry		Agriculture & Forestry	
	Direct	Total	Direct	Total	Direct	Total
Accomack	179.1	273.9	1.5	1.9	180.5	275.8
Northampton	64.1	86.7	1.6	2.3	65.8	89

Greenhouse/Nursery Farms

Source: From Headwaters Economics/Economic Profile System (EPS) (January 2015)

According to 2012 US Census of Agriculture, there are 42 greenhouse/nursery farms on the Eastern Shore of Virginia. Sales in Accomack are withheld, but sales in Northampton were \$11,832,000 in 2012. Total sales of the two counties may total over \$50 million (if average size Accomack equals average size Northampton).

Farm Business Income 2014 (EPS Ag 2015)

Source: Headwaters Economics/Economic Profile System (EPS) (January 2015)

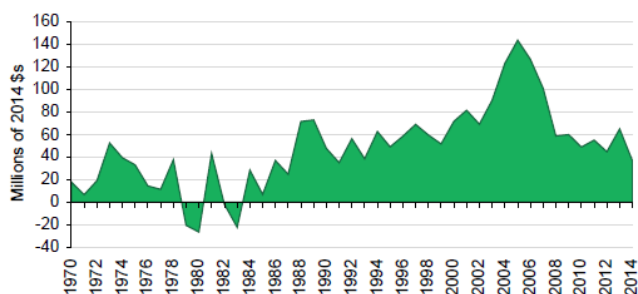
Farm Business Income, 2014 (Thousands of 2014 \$s)

	Accomack County, VA	Northampton County, VA	County Region	Virginia Non-Metro
Total Cash Receipts & Other Inc. (\$1000)	192,712	86,734	279,446	2,538,945
Cash Receipts from Marketing	186,278	77,962	264,240	2,287,201
Livestock & Products	132,167	24,554	156,721	1,416,274
Crops	54,111	53,408	107,519	870,927
Other Income	6,434	8,772	15,206	251,744
Government Payments	1,563	377	1,940	74,515
Imputed Rent & Misc. Income	4,871	8,395	13,266	177,135
Total Production Expenses	147,742	91,445	239,187	2,218,243
Realized Net Income (Receipts - Expenses)	44,970	-4,711	40,259	320,702
Value of Inventory Change	-2,423	-974	-3,397	-70,190
Total Net Income Including Corp. Farms	42,547	-5,685	36,862	250,472
Ratio: Total Cash Receipts & Other Income/Total Production Expenses	1.30	0.95	1.17	1.14

Farm business income shown here is different than farm personal income shown on the previous page.

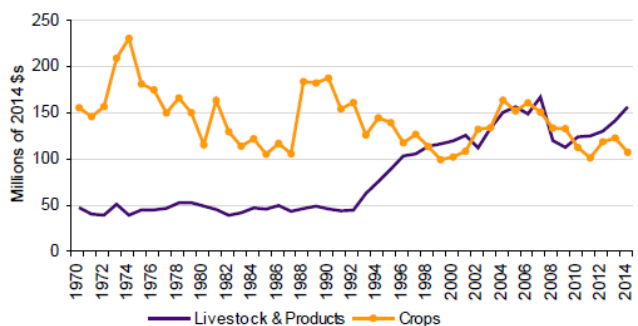
- From 1970 to 2014, net income including corporate farms grew from \$18.0 million to \$36.9 million, a 104.9 percent increase.

Total Net Income Including Corporate Farms, County Region



- From 1970 to 2014, cash receipts from livestock and products grew from \$47.5 million to \$156.7 million, a 229.8 percent increase.
- From 1970 to 2014, cash receipts from crops shrank from \$155.6 million to \$107.5 million, a 30.9 percent decrease.

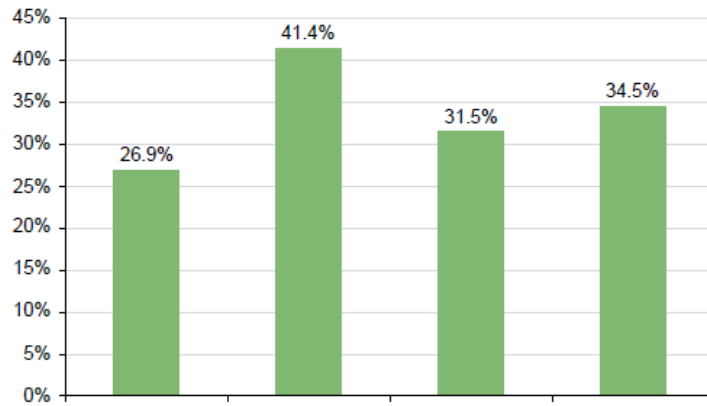
Cash Receipts from Marketings, County Region



Number of Farms and Land in Farms (Acres), 2012

	Accomack County, VA	Northampton County, VA	County Region	Virginia Non-Metro
Number of Farms	226	147	373	19,101
Land in Farms (Acres)	77,389	56,050	133,439	3,997,096
Average Farm Size (Acres)	342	381	358	209
Approximate Land Area (Acres)	287,681	135,432	423,113	11,578,118
Approximate Percent of Land Area in Farms	26.9%	41.4%	31.5%	34.5%

Approximate Percent of Land Area in Farms, 2012



- In 2012, Northampton County, VA had the largest percent of land area in farms (41.4%), and Accomack County, VA had the smallest (26.9%).

Number of Farms by Type, 2012

	Accomack County, VA	Northampton County, VA	County Region	Virginia Non-Metro
All Farms	226	147	373	19,101
Oilseed & Grain Farming	71	59	130	1,084
Vegetable & Melon Farming	13	13	26	367
Fruit & Nut Tree Farming	5	5	10	376
Greenhouse, Nursery, etc.	27	8	35	527
Other Crop Farming	15	16	31	5,136
Beef Cattle Ranch. & Farm.	6	3	9	8,103
Cattle Feedlots	0	0	0	185
Dairy Cattle & Milk Prod.	0	0	0	196
Hog & Pig Farming	4	0	4	123
Poultry & Egg Production	46	2	48	566
Sheep & Goat Farming	4	3	7	584
Animal Aquaculture & Other Animal Prod.	35	38	73	1,854

Land in Farms According to Use (Acres), 2012

	Accomack County, VA	Northampton County, VA	County Region	Virginia Non-Metro
Land in Farms	77,389	56,050	133,439	3,997,096
Cropland	64,271	42,807	107,078	1,385,574
Woodland	6,767	3,488	10,255	1,276,106
Land in Farmsteads & Buildings	5,523	0	5,523	178,710
Permanent Pasture & Rangeland	828	0	828	1,143,246
Percent of Total				
Cropland	83.0%	76.4%	80.2%	34.7%
Woodland	8.7%	6.2%	7.7%	31.9%
Land in Farmsteads & Buildings	7.1%	0.0%	4.1%	4.5%
Permanent Pasture & Rangeland	1.1%	0.0%	0.6%	28.6%

Poultry Processing

Source: VEC/LMI Dec2015: www.VirginiaLMI.com

Industry Employment and Projections

Long Term

	Employment			Percent	
	Estimated 2012	Projected 2022	Change	Total	Annual
Total, All Industries	3,947,721	4,481,928	534,207	13.53%	1.28%
Agriculture, Forestry, Fishing and Hunting	53,926	47,146	-6,780	-12.57%	-1.33%

2014 Economic Contribution of the Poultry Industry

Northampton County, VA

	Jobs	Wages	Economic Impact
Direct Impacts			
Poultry Production	7	\$250,100	\$2,094,700
Poultry Processing	0	\$0	\$0
Total	7	\$250,100	\$2,094,700

Supplier Impacts			
Agriculture	43	\$922,700	\$2,053,600
Mining	0	\$0	\$0
Construction	0	\$42,000	\$90,400
Manufacturing	2	\$149,300	\$1,709,700
Transportation & Communication	4	\$247,300	\$852,300
Wholesaling	4	\$336,000	\$795,600
Retailing	0	\$6,600	\$12,900
Finance, Insurance & Real Estate	1	\$92,300	\$411,700
Travel & Entertainment	1	\$39,500	\$99,600
Business and Personal Services	9	\$876,200	\$1,473,100
Government	0	\$17,600	\$36,400
Other	0	\$0	\$0
Total Supplier Impacts	64	\$2,729,500	\$7,535,300

Induced Impacts			
Agriculture	1	\$26,800	\$84,600
Mining	0	\$0	\$0
Construction	0	\$6,100	\$14,300
Manufacturing	0	\$34,100	\$280,300
Transportation & Communication	1	\$64,100	\$218,100
Wholesaling	1	\$80,200	\$192,900
Retailing	2	\$79,900	\$162,800
Finance, Insurance & Real Estate	1	\$69,000	\$379,000
Travel & Entertainment	2	\$51,900	\$129,800
Business and Personal Services	6	\$397,300	\$639,900
Government	0	\$11,000	\$20,100
Other	0	\$4,100	\$15,600
Total Induced Impacts	14	\$824,500	\$2,137,400

Total Economic Impact	85	\$3,804,100	\$11,767,400
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**2014 Economic Contribution of the Poultry Industry
Accomack County, VA**

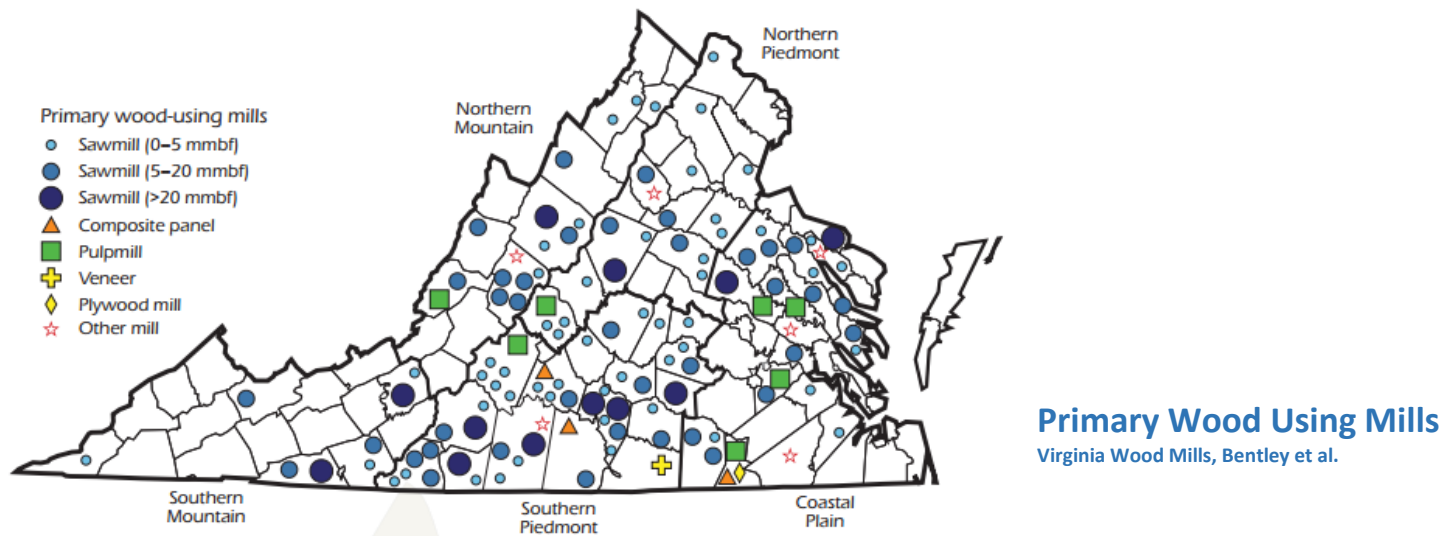
	Jobs	Wages	Economic Impact
Direct Impacts			
Poultry Production	41	\$1,378,100	\$11,976,700
Poultry Processing	2,899	\$113,950,400	\$1,500,932,600
Total	2,940	\$115,328,500	\$1,512,909,300
Supplier Impacts			
Agriculture	107	\$2,326,600	\$5,178,400
Mining	0	\$0	\$0
Construction	3	\$180,700	\$388,500
Manufacturing	10	\$644,000	\$7,377,200
Transportation & Communication	5	\$363,800	\$1,253,500
Wholesaling	6	\$582,900	\$1,379,700
Retailing	0	\$20,800	\$40,200
Finance, Insurance & Real Estate	5	\$333,200	\$1,486,300
Travel & Entertainment	4	\$106,100	\$267,300
Business and Personal Services	16	\$1,624,000	\$2,730,300
Government	1	\$84,400	\$175,000
Other	0	\$0	\$0
Total Supplier Impacts	157	\$6,266,500	\$20,276,400
Induced Impacts			
Agriculture	3	\$67,600	\$213,400
Mining	0	\$0	\$0
Construction	0	\$26,000	\$61,800
Manufacturing	1	\$147,100	\$1,209,200
Transportation & Communication	1	\$94,300	\$320,700
Wholesaling	1	\$139,100	\$334,600
Retailing	7	\$250,400	\$510,000
Finance, Insurance & Real Estate	4	\$249,100	\$1,368,500
Travel & Entertainment	5	\$139,300	\$348,100
Business and Personal Services	11	\$736,400	\$1,185,900
Government	1	\$52,400	\$96,700
Other	1	\$12,700	\$49,100
Total Induced Impacts	35	\$1,914,400	\$5,698,000
Total Economic Impact	3,132	\$123,509,400	\$1,538,883,700

Source: US Poultry and Egg Association <http://www.poultryfeedsamerica.org/>

Forestry Value

COUNTY	Average Yearly Value	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
ACCOMACK	\$1,819,370	\$3,323,827	\$2,885,945	\$2,600,669	\$3,333,152	\$1,483,528	\$1,306,048	\$807,103	\$909,788	\$676,468	\$894,471	\$1,792,073
NORTHAMPTON	\$831,387	\$1,927,656	\$2,683,803	\$1,302,918	\$1,618,650	\$296,066	\$235,371	\$214,423	\$550,080	\$222,800	\$47,894	\$45,602

Source: Virginia Department of Forestry, Annual Harvest Value 2002-2012 (current \$)
<http://www.dof.virginia.gov/harvest/data/harvest-value-name.htm>



Primary Wood Using Mills

Virginia Wood Mills, Bentley et al.

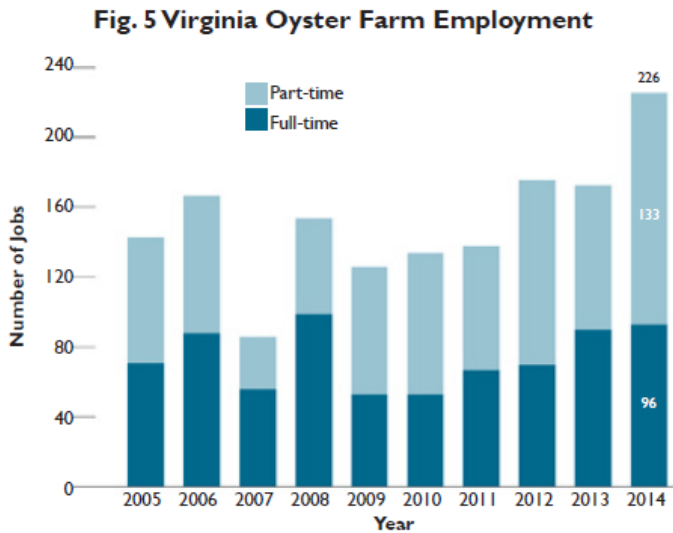
Figure 3—Primary wood-using mills by region, Virginia, 2011.

Aquaculture

	Hard Clams			
	2013		2005	
	Farms	Sales (\$000)	Farms	Sales (\$000)
US	278	64,594	434	60,403
Virginia	33	20,759	41	(D)
	12%	32%		

2014 (count)	Oysters, All				
		2013		2005	
		Farms	Sales (\$000)	Farms	Sales (\$000)
243m (\$38.8m) (+14%)	US	483	180,150	589	102,896
39.8m (\$17.1m) (+33%)	Virginia	60	20,763	18	(D)
		12%	12%		

Virginia aquaculture farmers include 33 hard clam producers with 2013 sales totaling \$20.8 million. These growers produced 32% of the total US hard clam production in 2013 and is #1 in US. Virginia's 60 oyster producers harvested \$20.8 million in 2013 as well, but their share of total US production was only 12%.



Source: Virginia Shellfish Aquaculture Situation and Outlook Report: Results of the 2014 Virginia Shellfish Aquaculture Crop Reporting Survey. (March 2015); Karen Hudson, Shellfish Aquaculture Specialist, Services Virginia Sea Grant Marine Extension Program; Thomas J. Murray, Associate Director Advisory, Virginia Institute of Marine Science

Single Oysters

- 66.7 million individual oysters were planted in 2012.
- 28.1 million previously planted market oysters valued at \$9.5 million were sold in 2012.
- 112 million seed oysters were sold by Virginia’s oyster hatcheries in 2012.
- 74% of market oysters sold in 2012 went to out-of-state buyers, a source of economic growth throughout the state.
- 70 full-time and 106 part-time jobs make up the total direct employment associated with oyster aquaculture sales in 2012.

	Hard Clams	Single Oysters	Total
Output (\$ millions)	\$61.5	\$19.7	\$81.2
Employment (#)	693	232	925
Income (\$ millions)	\$17.1	\$10.0	\$27.1
Taxes (\$ millions)	\$2.4	\$1.2	\$3.6

Source: Economic Activity Associated with Shellfish Aquaculture in Virginia – 2012 (July 2013)
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Virginia Institute of Marine Science
Virginia Sea Grant Extension Program/Hard Clams

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