



The Economic Development Strategic Plan

2008

This Report was prepared by the Clemson Institute for Economic and Community Development in collaboration with the BB&T Center for Economic and Community Development

Horry
County, SC



BACKGROUND

In January 2008, the Clemson Institute for Economic and Community Development and the BB&T Center for Economic and Community Development at Coastal Carolina University (CCU) teamed together to facilitate the creation of a strategic plan for economic development in Horry County. ***The purpose of this endeavor is to identify and prioritize issues surrounding economic development and to build consensus around a set of actions that may be taken in the pursuit of a collective economic vision.*** Building consensus through such a plan ensures that the collaborative resources of numerous public service entities and their private partners are efficiently leveraged to overcome the barriers and challenges to continued economic prosperity.

Over the course of the ten months, staff from the Clemson Extension Service and Coastal Carolina University guided a strategic plan taskforce through numerous exercises associated with the plan's creation. In addition to organizing the planning process, facilitators from each institution conducted research and analysis associated with priority issues identified by the taskforce. This report summarizes the initial findings of the assembled taskforce and makes recommendations for the sustained pursuit of economic development project, programs and policies that that will enhance the economic conditions necessary for growth and expansion of all sectors of the economy in Horry County.

Clemson Institute for Economic and Community Development (CIECD)

The Clemson Institute for Economic and Community Development (CIECD) connects the resources of Clemson University, and other Cooperative Extensions agencies, to the needs of South Carolina communities. There are three major "umbrellas" under which the different programs of the CIECD are housed: Community Outreach, Institute Initiatives, and Research. Community Outreach programs are programs we have been asked to conduct by the communities that are our stakeholders. Institute Initiatives are programs that we have initiated to fill a particular need. Research is the development of new information that can be used to help grow communities.

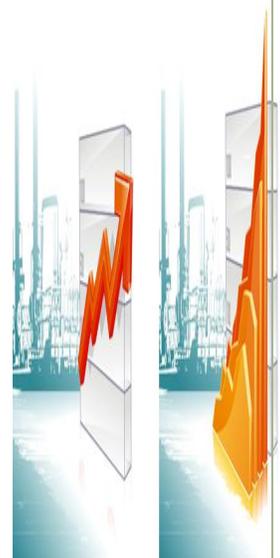
BB&T Center for Economic and Community Development

The BB&T Center for Economic and Community Development was created by the Horry County Higher Education Commission in 1988 to conduct applied research and offer special services that are relevant to the need of the region. The Center acts as an information center for economic data for the region and serves as a bridge between the university and the community. The Center also works to place the university in a position to provide the expertise necessary for community leaders to achieve their goals of regional economic success and diversity, and enhance the quality of life for the region.

Myrtle Beach Regional Economic Development Corporation

The Myrtle Beach Regional Economic Development Corporation was formed in 2005 after a comprehensive independent analysis aimed at increasing development effectiveness. The MBREDC is a public/private partnership that is dedicated to strengthening and promoting Horry County's economic growth through new business recruitment and existing industry retention and expansion efforts.

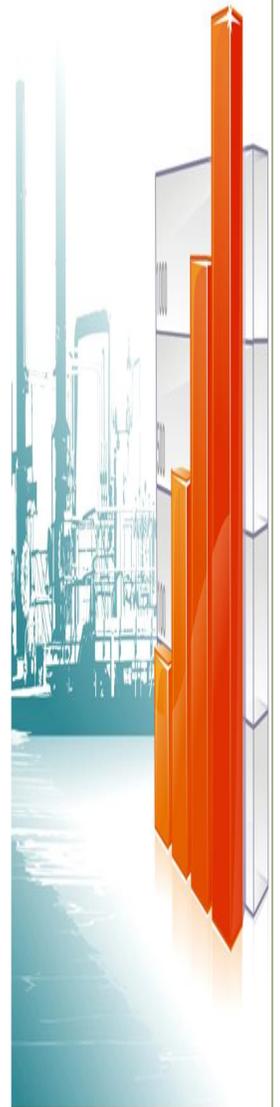
The Myrtle Beach Regional EDC is dedicated to meeting the needs of today's industry and creating a competitive and diversified business climate in Horry County.



EDA University Center for Economic Development (UCED)

The EDA University Center for Economic Development (UCED) was established in 2006 as a joint program of the Clemson University Regional Economic Development Research Laboratory (REDRL) and the Clemson Institute for Economic and Community Development (CIECD). The UCED's principal objective is to foster economic development in South Carolina by providing research and technical assistance to organizations and areas concerned with job and income creation.

The UCED is located in the Department of Applied Economics and Statistics, Clemson University, Clemson, South Carolina. Funding for the Center is provided by Clemson University and the Economic Development Administration (EDA) of the U.S. Department of Commerce.



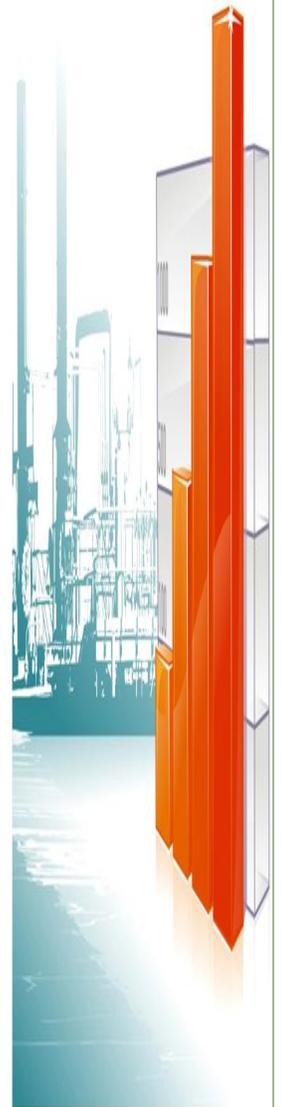
The Strategic Plan Taskforce/Participants

The Economic Development Strategic Plan for Horry County process is guided by a taskforce of representatives from public and private sector businesses, education institutions and government entities. The Strategic Plan Taskforce was assembled at the beginning of the process and provided not only the bulk of the information that follows, but leadership and insight that has been invaluable to this project. The following individuals participated on the Strategic Plan Taskforce.

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Loris Healthcare System
Horry Solid Waste Authority
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Grand Strand Regional
BB&T
Burroughs & Chapin, Myrtle Beach Area Chamber of Commerce
Horry County Planning
Little River Medical Center
Waccamaw Riverkeeper
Horry County Schools
Waccamaw Council of Governments
Horry County Council
Myrtle Beach Golf Holiday
Horry Telephone Cooperative
Horry County Pride
North Myrtle Beach Planning
Horry Georgetown Technical College
AvCraft
North Myrtle Beach Chamber of Commerce
Conway Chamber of Commerce
The Jackson Companies
Coastal Carolina University
Conway Medical Center
Northeast Strategic Alliance
Metglas Inc.
Myrtle Beach Regional Economic Development
COAST RTA
Myrtle Beach Regional Economic Development
Grand Strand Water and Sewer Authority
City of Conway
SCRORE
Horry County Schools
COAST RTA
City of Myrtle Beach Planning
Grand Strand Technology Council
Horry County Council
Horry County Council
Waccamaw Regional Education Consortium
Holliday Associates
City of North Myrtle Beach
The Yahnis Corporation



INTRODUCTION

In 2006, the Clemson University and Coastal Carolina University (CCU) were brought together by Horry County business and government leaders in the execution of joint applied research and outreach activities affecting economic development. Among the activities initially pursued were strategic planning, land-use planning and community development initiatives that stimulate economic development.

Working through the Clemson Institute of Economic and Community Development, extension staff prepared a planning framework to guide the creation of a strategic plan for economic development in Horry County.

The resulting public-private planning effort was supported by research capacities at both public universities, insightful local input from government, community and business leaders and planning professionals across the county.

This plan serves as the organizing framework for actions that will catalyze economic development activity. The following components make up the plan's structure:

- Economic Benchmark Data -Analysis
- Economic Vision/Mission
- Priority Area Goals and Strategies
- Technical Reports – based applied research
- Strategies Matrix
- Implementation Recommendation

SO WHAT IS ECONOMIC DEVELOPMENT?

Economic development is a program, a group of policies, or activities that seek to improve the economic well-being and quality of life for a community. Ideally, it creates and retains jobs that facilitate growth and provide a stable tax base. Economic development programs can take numerous approaches. No single strategy, policy, or program can assure success for a community. Communities succeed when economic development is a priority, but many suffer from a lack of leadership or investment in economic growth.

Economic Development Levels

A. Organizational Development

Creating and maintaining a recognized and legitimate forum for exchanging ideas and addressing the needs of the community. This will allow you to set a strategy, raise funds, and work with partners in a more efficient manner.

B. Product Development

Investments that are maintained, upgraded, or developed by labor and capital to improve the community. This may include infrastructure, downtown areas, gateways, business parks, or speculative buildings.

C. Market Development

Activities that focus on recruiting individuals who would enhance the economy, such as retired citizens or lone eagles, and enlarging the market area in which they could receive products and services.

D. Business Development

Programs that nurture businesses growth and investment. These are often the core of most economic development activities and include business attraction, retention and expansion, tourism, and startup and emerging businesses.

E. Workforce Development

Policies that build the skills of its local workforce. This includes partnerships between business, education, and government so that all residents can be contributing members of the local economy.

Economic Development Benefits

Increased Tax Base

Additional revenue to support, maintains, and improves local services such as roads, parks, libraries, and emergency medical services.

Job Development

To provide better wages, benefits, and opportunities for advancement.

Business Retention

Businesses that feel appreciated by the community and, in turn, feel as if they are contributing to the economy will stay in town.

Economic Diversification

Helps expand the economy and reduces a community's vulnerability to a single business sector.

Self-sufficiency

Public services would be less dependent on intergovernmental transfers that change with each election.

Quality of Life

More local tax dollars and jobs raise the economic tide for the community, which generally increases the overall standard of living of the residents.

Recognition of Local Products

Oftentimes, successful economic development will occur when locally produced goods are consumed to a greater degree in the local market.

In order to create an effective program that works for the local economy, the community must understand the five levels of development. Each level consists of various strategies that can be implemented based on their geography, economy, and politics.

WHY IS ECONOMIC DEVELOPMENT IMPORTANT?

Historically, the local economy was looked at as something that had a presence, but for which citizens had no opportunity to influence. Today, however, we believe that active community leaders as well as local policies have a direct influence on the economy.

“The presence of assertive, forward-thinking people in both the private and public sector may be the single most critical variable in community economic vitality”.
(Glenn Pulver, 1988)

METHODOLOGY

Initiated through a collaborative memorandum of understanding signed by officials from Horry County government, Coastal Carolina University and Clemson University, ***The Economic Development Strategic Plan for Horry County*** is the result of planning by numerous local business leaders, public servants and community advocates.

Starting in January, 2008 a Taskforce composed of community and business leaders from around the county was convened to establish a planning framework, develop of common economic vision, review quantitative data necessary for benchmarking economic conditions, establish goals and strategies related to the plans primary focus areas and to design a framework through which economic development policies, projects and programs are sustained in support of stated goals.

Within the overall taskforce, subcommittees were established on the basis of priority issue areas identified by the Taskforce at-

large. Equipped with data presented by Coastal Carolina and Clemson University economists, Taskforce members established individual goals sets related to the following ten focus areas: business, collaboration, cultural resources, implementation, infrastructure, education, healthcare, natural resources, tourism, and transportation.

Strategies were developed in response to information developed through numerous group planning exercises, similar planning studies and reports, outside research, and individual subcommittee meetings. Final recommendations were drafted upon reaching a consensus of all Taskforce participants and the following document has been prepared for public review and input.

The resulting economic development vision, goals, strategies, implementation matrix and supporting research is a framework through which future economic development planning can be pursued in Horry County and the Region. Future modification and revision are critical to sustaining the organizational momentum that is required in pursuit of the goals and strategies contained within.

WHERE DO WE GO FROM HERE?

The Economic Development Strategic Plan for Horry County highlights an array of indicator data that inform projects, policies and programs that once achieved can dramatically change the economic landscape and improve the opportunities for balanced and sustainable economic growth. This planning framework is a static set of recommendations that when implemented serves as a foundation for a cohesive community-wide commitment to seeing positive changes implemented.

Accordingly, the sustained support of business and community leaders is required to see these initiatives through. An implementation framework through which such support is developed is suggested in this document, but in the in end it is the responsibility of those with a collective stake in the local economy to nurture the commitment that is necessary to move the area's economy forward.

Strategies have been prioritized on the basis of input and impact. These rankings identify those initiatives to be pursued first in order to generate the successes that are required to sustain momentum. This document is the first piece of what is characterized as a puzzle relating to economic development planning. Therefore numerous additional pieces are required before the picture begins to clarify itself. With time and collaboration between other essential economic development planning efforts, the strategies will bear fruit that nourishes all

Priority Areas

The following nine priority areas were identified by taskforce participants as those for which strategies should be developed to enhance the economic development conditions in the communities that make up Horry County.

1. Cultural Assets
2. Education
3. Healthcare
4. Infrastructure
5. Intergovernmental Collaboration
6. Natural Resources
7. Tourism
8. Transportation
9. Business and Entrepreneurship

Planning Framework



constituent parts of Horry County's economy and communities within.

ECONOMIC PLANNING INITIATIVES

Horry County and included jurisdictions maintain an extensive history of planning related to land use, infrastructure development, and transportation. At least six independent jurisdictions regularly pursue planning activities through governmental staff and/or consulting services. Each community maintains its own vision for growth and the management thereof as articulated by Comprehensive Plans. Although each individual jurisdiction plans for economic development accordingly, limited effort has been devoted to the establishment of a cohesive economic development strategy for the entire county. The following public and private planning efforts represent a focus on county-wide economic development.

Grass Roots Initiative for Planning and Progress (GRIPP)

The Grass Roots Initiative for Planning and Progress (GRIPP) was formed as a non-profit organization dedicated to fostering cooperative planning in Horry County. Born out of a series of growth forums held at Coastal Carolina in 1991, the group went on to complete a document formed around a framework of eight focus areas: economic development, education, environment and land use, infrastructure, healthcare and emergency services, cultural resources, intergovernmental collaboration, and image.

Built around the input and endorsement of many business, education, government and community leaders the GRIPP process resulted in the presentation of many recommendations that went on to be fulfilled. Interviews with participants in the process revealed a number of reasons that effort was both as successful as it was and perhaps not sustained.

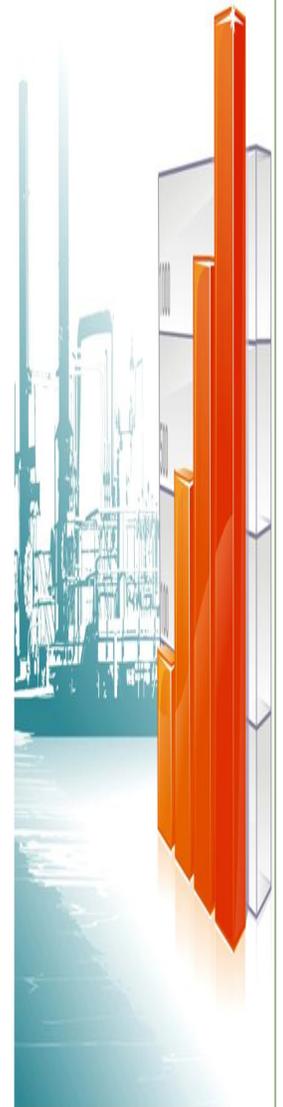
Given the grass-roots nature of the planning process, there was no mandate for the acceptance of and/or continuation of planning efforts beyond the scope of the initial report. Accordingly neither staff nor long-term funding resources were acquired to see the implementation of recommendations through to fruition. Though a group structure was formed to see the initiatives through, the eventual dissolution of the effort was precipitated by a fundamental disagreement with some findings of the report.

Though all findings of this planning effort s were arrived at independently of those included in the GRIPP effort, many parallels are drawn between its recommendations and the strategies derived from this plan. In spite of the fact that many GRIPP objectives were successfully achieved, many of the same issues related to economic development remain just as valid seventeen years later. This effort is informed by planning efforts such as GRIPP and seeks to both build on its successes and avoid its mistakes.

Target Industry Study

In 1999 PARTNERS Economic Development Corporation contracted with Leak-Goforth Co. LLC and Urbanomics, Inc. to develop a targeted industry study for Horry. The information gleaned from the study was subsequently used as the economic profile basis for An Efficiency Study of PARTNERS conducted by KPMG LLP.

While the Leak-Goforth study is focused on target industry clusters and geographic site issues, the KPMG study focuses on the industry recruitment methodology employed by the since dissolved PARTNERS organization. As with similar previous planning efforts, information gleaned



from each above mentioned study was used to form both the framework for this planning effort and support the strategies that have been included.

Envision 2025

Envision 2025 is the title of the Comprehensive Plan for Horry County. Adopted in 2008 the plan covers each of the seven planning elements required by SC Planning Enabling Legislation and other elements deemed necessary for the benefit growth management. As the primary foundation for county land use planning activity, the document establishes a policy direction for each of the following areas: population, housing, natural resources, cultural resources, community facilities, economics, and land use and priority investment. The comprehensive plan serves as the policy framework through which land planning codes are administered, land use decisions are made and related project are pursued.

The Economics element of Envision 2025 sets forth four policies related to this report:

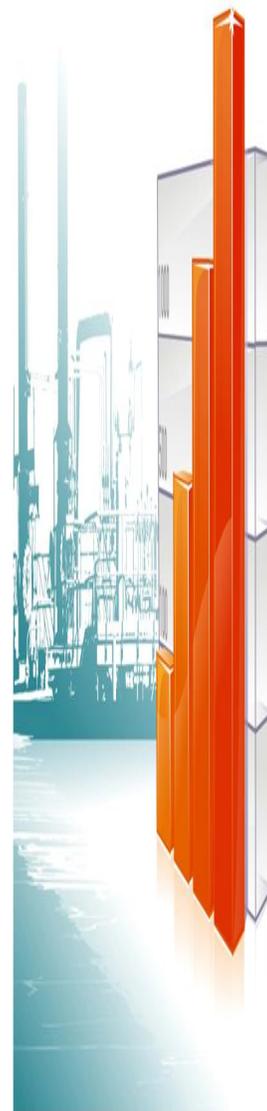
- 1) **Create and support a coordinated, comprehensive program for economic development;**
- 2) Develop and coordinate government funds and incentive funds to target economic growth;
- 3) Promote an education system that supplies a highly qualified workforce for all industries; and
- 4) Recruit a diverse mix of business and industry

Strategy (A) associated with Policy 1 notes that Horry County Council, municipal government officials, the Myrtle Beach Regional Economic Development Corporation, area Chambers of Commerce, citizens institutions, organizations, civic groups and business and industry leaders should be engaged in the completion of a “comprehensive Economic Development Plan for Horry County”.

It is this policy that forms the basis of this planning project. As with other previous and collateral economic planning efforts, a number of goals and strategies build upon each other. Accordingly, even more detailed project plans are called for as strategies in this document. The resulting programs, projects and policy recommendations are intended to bring us one step closer to the realization of a collective economic vision for prosperity in Horry County.

SO WHAT IS HORRY COUNTY’S ECONOMIC VISION?

Initial taskforce planning sessions were focused on the development of an articulated vision for economic growth in the future. Numerous group exercises such as a SWOT (strengths, weaknesses, opportunities, threats) analysis, an economic timeline, and findings of previous collateral planning efforts informed the creation of the following statements. These statements were used as a contextual platform from which all goals and strategies developed later in the process were grounded.



Vision

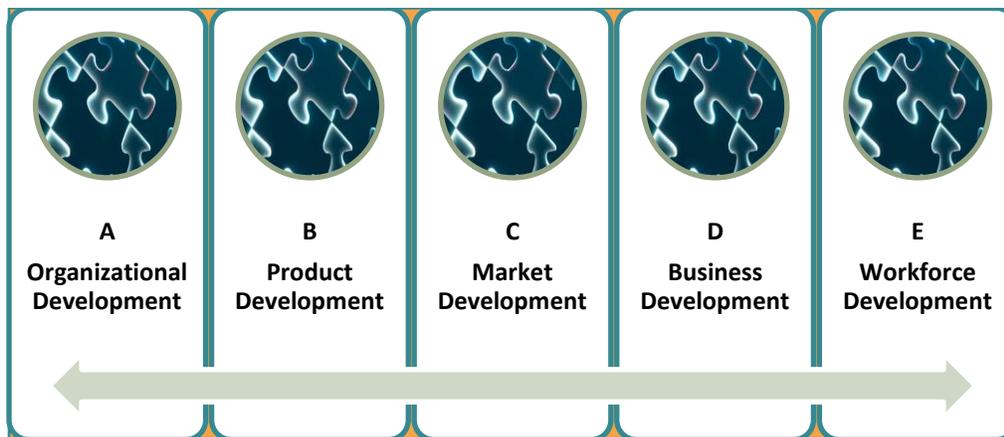
A balanced and healthy economy through improved education, economic diversity, infrastructure, and natural resources.

Mission

Horry County offers an enviable quality of life, deep cultural roots, distinct natural resources, and a history that fosters a special sense of place. Horry County will build on these assets to assure a balanced and healthy economic environment through enhanced educational opportunities, economic diversity, infrastructure development, and the preservation of our natural resources.

Achievement of Horry County’s economic vision requires a long-term organized focus that goes well beyond the entrepreneurial successes that have made its communities what they are today. Any economic strategy that seeks to fulfill the above mentioned outcomes must rely on both public and private partnerships in the pursuit of common economic goals. It is not only important that governments understand and support the needs of the business community, but also that business leaders work collaboratively with policy makers to nurture an environment that spawns new economic opportunity in all sectors.

This plan establishes strategies that fall in one of five categories in order to meet enumerated outcomes and advance the overall economic vision.



Based on findings of economic benchmark research and information associated with previous and current planning exercises, several principle outcomes have been established as needs in the local economy. A long-term focus on strategies aimed at these outcomes ensures that Horry County offers opportunities to start and grow an array of new businesses while sustaining those assets that are mainstays of the local economy.



ECONOMIC DEVELOPMENT PLANNING OUTCOMES

1. Economic Diversity

An economy is made up of many different kinds of activity, and the economic structure varies greatly across local areas. Understanding the structure of the local economy is critical for understanding both the long- and short-term performance of an economy, as well as the long- and short-term challenges and opportunities facing an economy.

For example, an economy that is heavily dependent on manufacturing activity is likely facing decades-long challenges in terms of job losses and plant closures. An economy heavily dependent on tourism is likely more susceptible to swings in nationwide consumer income and spending trends when compared to an area that has a large government or military presence. Industry diversification is commonly viewed as a goal of economic development. Generally, a diverse local economy is likely to be a more stable economy, one that is less susceptible to industry specific shocks that could cause volatility in more specialized economies.

To examine the diversity of Horry County's economy, Table 1 provides the employment share for each of 21 industries. Also provided is the corresponding employment share for the United States. The industries are ranked from largest to smallest in terms of industry size in Horry County. All data are from 2006 and are provided by the U.S. Bureau of Economic Analysis.

	<i>Horry County</i>	<i>United States</i>
<i>Accommodation and Food Services</i>	19.2	6.7
<i>Retail Trade</i>	15.0	10.8
<i>Construction</i>	11.1	6.5
<i>Government</i>	9.7	13.5
<i>Real Estate</i>	7.2	4.3
<i>Health Care</i>	5.7	9.9
<i>Administrative and Waste Services</i>	5.5	6.0
<i>Other Services</i>	5.1	5.7
<i>Arts, Entertainment, and Recreation</i>	4.3	2.0
<i>Finance and Insurance</i>	3.8	4.7
<i>Professional and Technical Services</i>	3.4	6.6
<i>Manufacturing</i>	2.9	8.3
<i>Wholesale Trade</i>	2.1	3.7
<i>Transportation and Warehousing</i>	1.4	3.2
<i>Information</i>	1.3	2.0
<i>Agriculture</i>	1.0	1.6
<i>Management of Companies</i>	0.5	1.1
<i>Private Educational Services</i>	0.5	2.1
<i>Forestry and Fishing</i>	0.3	0.6
<i>Utilities</i>	0.2	0.3
<i>Mining</i>	0.1	0.5

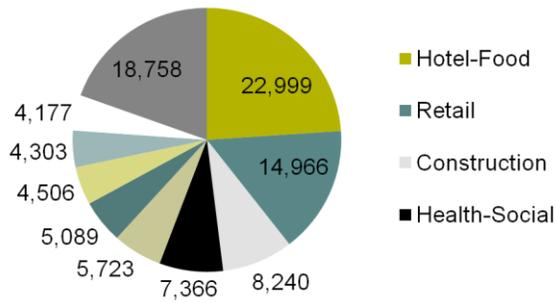
The three largest sectors in Horry County are: Accommodation and Food Services (19.2 percent of all jobs), Retail Trade (15.0 percent of all jobs), and Construction (11.1 percent of all jobs). Taken together, these three sectors account for 45.2 percent of total employment in Horry County. Nationally, these same three sectors make up 24.0 percent of total employment.



Meanwhile, Horry County has a below average presence of other sectors, including Manufacturing, Professional and Technical Services, Finance and Insurance, Health Care, and Government.

Overall, these employment shares suggest that Horry County's economy is relatively concentrated in a few large

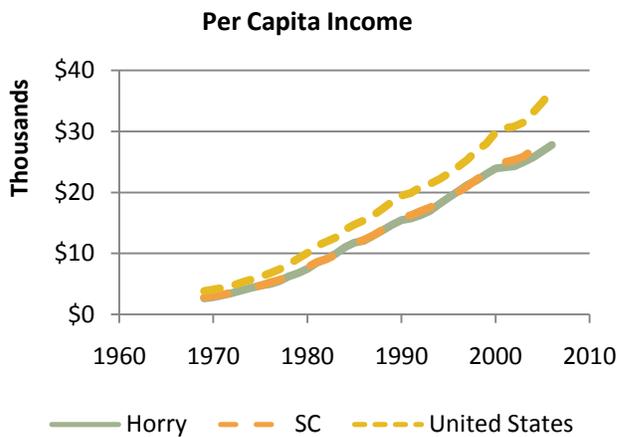
sectors. Importantly, these sectors are tied to tourism and housing. As the experience of 2008 indicates, an area heavily reliant on sectors such as tourism and housing stands to bear the brunt of national downturns that affect these activities. While tourism will always be an important driver of the Horry County economy, it is also important for the area to strive to diversify to help insulate the local economy from future downturns in housing, consumer spending, and tourism. Further, diversifying Horry County's economy can result in higher wages and faster growth in key measures of living standards such as per capita income and median household income.



1. Attracting and Retaining a Talented Workforce

One of the major obstacles for many local areas working to diversify an economy and achieve higher wages is the availability and quality of the local workforce. The path towards greater prosperity differs across local areas. In many rural parts of South Carolina, for example, one of the major challenges lies in the number of jobs available for citizens. Consider nearby Marion County. There, the estimated labor force participation rate stood at just 51.3 percent during 2005. In this situation, almost any job growth will translate into improved living standards and

higher per capita income, even if those new jobs pay at or below average wages. This is because Marion County is faced with such a large percentage of the working age population that is currently detached from the labor force.



In Horry County, on the other hand, the estimated labor force participation rate during 2005 was 66.1 percent, higher or similar to both the state and

national averages. In this case, the only way to achieve higher per capita income and improved living standards is to attract not just more jobs, but also higher paying jobs.

While increasing the diversity of the local economy can help support higher wages, the greatest positive impact on wages is through increased worker productivity. In any economy at or near full employment, sustainable gains in living standards come about via gains in worker



productivity. These gains in productivity are driven by technological advances and – perhaps most importantly – through gains in human capital. Investments in human capital – through a commitment to improving education and labor skills – result in payoffs in the form of greater productivity, higher wages, and increased per capita income levels.

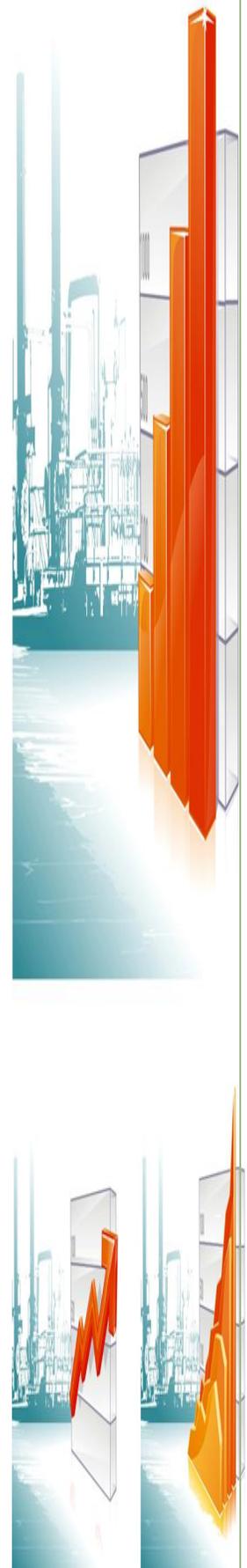
Table 2: Percentage of Population Age 25 and Older with Given Level of Educational Attainment: 2006	<i>Horry County</i>	<i>United States</i>
<i>Less than 9th Grade</i>	5.2	6.5
<i>9th to 12th grade, no diploma</i>	10.2	9.4
<i>High school graduate (includes equivalency)</i>	34.0	30.2
<i>Some college, no degree</i>	18.8	19.5
<i>Associates degree</i>	9.3	7.4
<i>Bachelor's degree</i>	15.4	17.1
<i>Graduate or professional degree</i>	6.9	9.9

Table 2 provides a snapshot of educational attainment levels in Horry County relative to the national average during 2006. While Horry County compares favorably in many respects, it does have a below average presence of residents with at least a bachelor's degree. In Horry County, 22.3 percent of the population aged 25 and above had at least a bachelor's degree. Nationally, this figure stood at 27.0 percent. A further challenge for Horry County is that its neighboring counties, including traditional sources of labor into Horry County, have considerably lower levels of educational attainment. In Marion County during 2000 (latest available data), only 68.0 percent of the population 25 years and older were high school graduates, and only 10.2 percent had at least a bachelor's degree. For Horry County to achieve its goals of increasing economic diversity and realizing gains in per capita income, it must provide productive workers with relevant skill sets.

Many economists argue new economic circumstances have altered the ways that cities and regions establish and maintain their competitive edge. Knowledge has replaced many conventional economic development factors as the driver of economic growth. In this new era, a region's ability to attract and retain the highly educated talent needed for growth has become the key factor in its economic success. Because the demand for talented people is greater than the supply, highly skilled workers can essentially choose where to live and work. When it comes to choosing where to locate, quality of life or quality of place features are a primary consideration for young, educated professionals.

2. Maintaining Quality of Place

The quality of place in Horry County has long been one of the area's most important assets. It is absolutely crucial that economic development within Horry County builds upon, maintains, and enhances this feature. The long-term success of the area will always be linked with the fortunes of tourism. Again, while diversifying the economy into other areas is critical, Horry County's tourism industry will always be the main driver of the local economy. This is due to the abundant natural amenities that make up the area.



Quality of place may be defined as those characteristics of a community or region that make it distinctive from other places and attractive as an area to reside, work, and/or visit. Quality of place encompasses a community's environment, civic traditions, cultural amenities, and recreational opportunities. It is multidimensional and includes both tangible and intangible factors. That makes measuring it inherently difficult. Unlike traditional economic factors such as tax rates and workforce size, which can be assigned numeric values, quality of place data are not uniformly specified and documented, and make it tough to compare one place to another.

Though it may be tough place a finite value on the beauty of beaches in Garden City or Myrtle Beach or the quaint charm associated with Conway Riverfront, the value is present and transferrable to economic development activity across the spectrum. Whether the objective is maintaining a level of attractiveness to incoming tourist, retirees or a skilled-workforce or sustaining a desirable quality of life for permanent population, "quality of place is" is a crucial component of the economic development dynamic.

Throughout his research on economic development, Carnegie Mellon economist Richard Florida notes that the following quality of life factors most influence a knowledge workers decision to move to or remain in a particular location:

- Balanced economic opportunity and lifestyle
- Labor Market that offers a variety of employment opportunities
- Variety and accessibility of natural, recreational, and lifestyle amenities
- Areas that allow for a to blend of work and leisure
- A distinct sense of place
- Environment conducive to an active lifestyle
- Alternative arts and culture opportunities
- A healthy urban ecosystem an natural resources
- Diversity of populations and demographics
- Creativity and Innovation

Some scholars believe that such workers, and the businesses they generate and attract, are beginning to locate based on historically non-economic factors such as climate, recreational opportunities, access to nature, and cultural amenities. In this case, a region's unique quality of place becomes a tool for attracting workers and business (Florida, 2002). From the perspective of business location, particularly attracting and retaining corporate headquarters, information technology industry, and other sectors that carry the promise of high-paying jobs, cultural and natural amenities are a vital component to a local area's portfolio. Along with more conventional economic development factors related to: a competitive tax environment, the quality of the education system, access to the transportation network, and proximity to key suppliers, quality of place factors play a significant role in determining which geographies grow and which areas decline. As the overall economy becomes more knowledge-based and technologically intensive, it is reasonable to assume that quality of place factors become more important, particularly as it relates to attracting one of the most critical assets, highly educated people (Reilly, Renski, 2008).

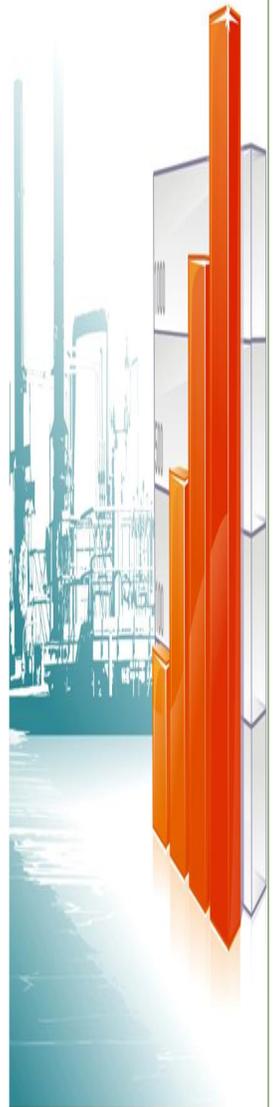
Though Horry County is well positioned to compete with many communities respecting quality of place, there are steps that may be taken to ensure that such factors are used as an advantage in the economic development arena. Quality of place strategies advocate for growth that supports and enhances a particular areas distinct character ad identity, whatever it may be. Protecting the



unique natural and manmade assets of both urban and rural ecosystems are one means to enhance economic development potential. In addition, the development of new cultural activities and recreational opportunities added to the vast array of those that currently exists makes the area even more attractive to a diversity visiting and permanent populations.

Several studies indicate that quality of place is perhaps the most direct determinant of growth and sustainability in the tourism industry. As the overall market is highly competitive, each geographies unique identity is seen as a competitive asset with respect to attracting tourist (Reilly, Renski, 2008). In pursuing economic development strategies that enhance quality of place it is possible to maintain a healthy attractive natural environment that helps to attract and retain talented residents, employers and visitors on which the sustained well being of the community depends.

In consideration of the above mentioned outcomes, the following categorized goals and strategies have been developed to enhance the county's physical, cultural and natural assets as factors that will encourage economic growth and sustainability.



BUSINESS/ENTREPRENEURSHIP

1.1 Develop a public campaign that highlights the importance of a diversified economy;

- a) Showcase local entrepreneurs to visitors;
- b) Refine County's economic marketing messages to be consistent with the county's targeted value-added industry clusters;

1.2 Market Horry County as a place to start and expand a high value business;

- a) Form a work-group subcommittee that will develop a plan for building and supporting entrepreneurship in the county and region;
- b) Further develop business retention and expansion programs;

1.3 Foster entrepreneurial networks;

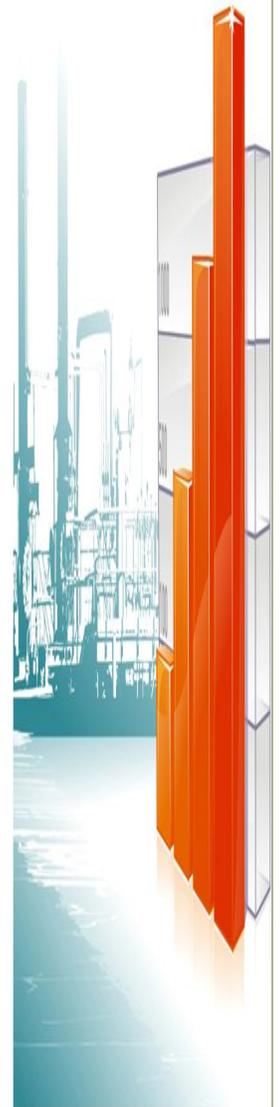
- a) Establish a forum for entrepreneurs to network with each other and use this and other means to raise awareness in the community about small business resources available to prospective and small business owners;
- b) Support Horry Industrial Alliance efforts to meet the needs of existing industries;

1.4 Establish a culture of entrepreneurship and strengthen infrastructure in support of small business and entrepreneurs;

- a) Support the development of entrepreneurial education curriculum in Horry County Schools, and higher education institutions;
- b) Establish incubator space for lifestyle businesses and entrepreneurial small business enterprises;
- c) Develop a sustainable local funding source for entrepreneurs and small businesses and leverage all potential financial resources;
- d) Develop a matrix of available services and their targeted entrepreneur levels to understand the network of service and identify gaps;

1.5 Develop a research based approach to identifying and strengthening target business sectors for recruitment, retention, expansion, and growth

- a) Complete a target industry study that identifies market opportunities for new business recruitment and expansion;
- b) Actively recruit companies identified in updated target industry studies for the County;



COLLABORATION

2.1 Work to improve relationships between all levels of government

- a) Use an existing forum (e.g. Horry County League of Cities, Coastal Alliance) to bring together all units of local government on a regularly scheduled basis to discuss planning, issues and strategies;
- b) Convene a regional economic council to discuss long term strategies related to regional and collaborative economic development initiatives;

2.2 Identify and quantify the benefits and cost of various levels of collaboration

- a) Conduct a categorized assessment of the cost and benefits of various levels of collaboration with respect to the provision and acquisition of public goods and services;

2.3 Develop strategies to build coalitions for reform of land use laws and protection of the environment.

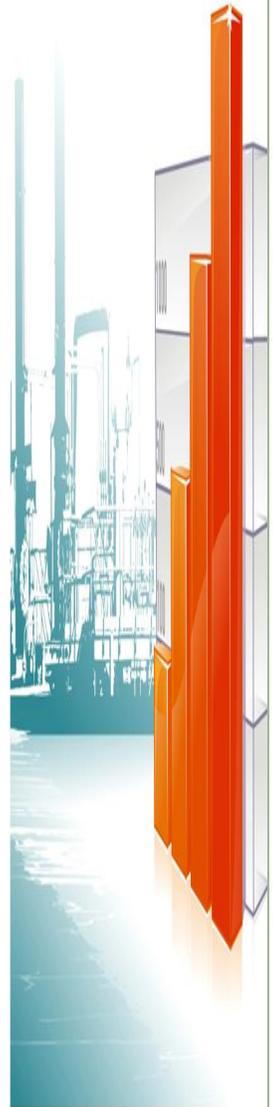
- a) Convene topic based roundtable discussions between peer departments of local governments and public service entities (i.e. planning roundtable, public safety roundtable, recreation roundtable, etc.);
- b) Conduct an objective assessment of potential positive and negative attributes associated with consolidation of land planning activities;

2.4 Provide more consolidated and streamlined regulations and practices representing the various citizen interests.

- a) Identify opportunities for consolidated incentive, licensing and permitting programs applicable to projects with significant economic impact;
- b) Establish a forum through which citizens and professionals working in the development sector may remain current on the application of various planning tools in communities that make up the region (i.e. planning leadership programs, land use academy, etc.);
- c) Support the development of new business and industry partnerships that enhance the economic development environment in Horry County;
- d) Develop a regional land planning matrix that identifies consistency between land planning policies and differentiates the geographic application of regulations;

TECHNICAL REPORT 2: COLLABORATION

Numerous previous planning exercises such as the Grass Root Initiative for Planning and Progress (GRIPP) and surveys conducted by the Myrtle Beach Regional Economic Development Corporation have identified that significant need to foster both greater levels of communication and collaboration among public service entities and government bodies in different areas of the county. This report discusses some difficulties of achieving intergovernmental relations will be introduced along with suggestions to overcome these barriers. Examples of areas that have broken down these barriers to cooperation will conclude the overview.



Intergovernmental Relations are traditionally defined 'as principal inter-actions between governmental groups of all categories and levels.' Intergovernmental relations are an evolving technique of institutional co-operation that seeks to concentrate on the relations of interdependence. Intergovernmental relations is intended to promote and facilitate co-operative decision-making and ensure that policies and activities across all spheres advance service delivery and meet the needs of citizens in an effective way.

Schaller admits that, there is relatively little research on how to accomplish intergovernmental cooperation or collaboration. Schaller and others have introduced some concepts to achieve effective intergovernmental relationships. Examples of these concepts are strong communications and leadership, sharing common visions and values and working together under formal arrangement or contract. Barriers to intergovernmental cooperation include decision-making authority, communication, accountability and responsibility and balancing competing objectives.

Amrhein et al. introduces a continuum of collaboration to allow organizations to identify, how and what type of collaboration would work best for the organizations or potential partners.

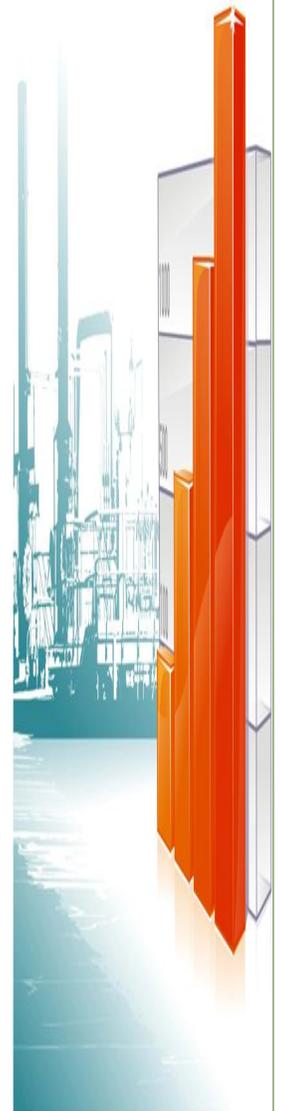
The benefits of intergovernmental cooperation are endless for an area a few examples are utilizing this feature would remove duplication of services while, reducing costs. Another benefit of intergovernmental cooperation is that it allows communities to capture economies of scale while correcting service inequities. Intergovernmental cooperation also has the ability to maintain or enhances quality of local services while fostering stronger relations with all members of the community.

While the benefits are apparent there are still barriers to intergovernmental cooperation process. Amrhein et al. state that, "Given a choice, all local governments would prefer to be self-producers and self-providers of community services." They list issues such as turf protection and identity issues as one of the main reasons it is hard to foster intergovernmental collaboration. Other authors have cited hidden agendas and apprehension of loss control as other issues that have to be overcome before an area can contemplate intergovernmental cooperation. Amrhein et al. examine issues of establishing price and allocation of costs as another factor that prevents cooperation. Uncertainty and trust are another reason why there is a lack of intergovernmental cooperation for economic development.

The Economic Development Administration states that, "For strategic economic development planning to be effective, the engagement of the private and nonprofit sectors and all levels of government are critical." This means that intergovernmental cooperation and private/public cooperation needs to be achieved for successful economic ventures.

Schaller introduces three main forces for intergovernmental collaboration: public expectations, outcomes versus inputs and heightened expectations.

A public opinion survey in Michigan found that a majority of respondents preferred that all three levels of government—federal, state, and local be involved in transportation, environmental, and economic development (Thompson and Elling 1999 Qtd in Schaller) This explains that the public is aware of the benefits that can be afforded to them through the use of intergovernmental collaboration. Bollens (1997) notes that "cooperation is seen as more innovative, politically



possible, and responsive than the wholesale creation of comprehensive, multifunctional governments.” (Qtd in Schaller)

Another factor that promotes the usage of intergovernmental collaboration is outcomes versus inputs. Emphasis on outcomes means identifying “a set of societal goals that represent results in the lives of real people those public programs should be helping to achieve, and to measure and regularly track progress toward their achievement” (ACIR 1997).

The final force discussed is heightened expectations for citizen participation. Overall the developmental efforts and the need for intergovernmental collaboration would not be necessary without the citizens. Their input in the planning and development process is an integral component for assuring that their voices are heard and some consensus is achieved.

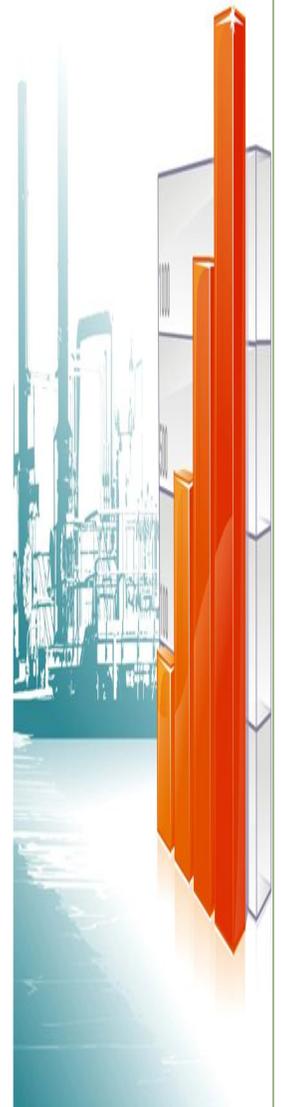
The aforementioned forces are just a few examples of factors that promote intergovernmental collaboration. Several agencies and places have fostered effective relationships in order to enhance their constituents’ best interest; one of those places will be examined Greenville.

Greenville:

Greenville has a rich history of intergovernmental collaboration along with private/public partnership. The city council enters into development agreements for their public-private partnerships. Nancy Whitworth, Economic Development Director, City of Greenville, introduces several lessons that the city learned along the way, which can be helpful to other areas trying to foster intergovernmental collaboration. This city and the following information were featured in Economic Development America, Fall 2006.

Some of those include:

- Be an entrepreneur. Think and act entrepreneurially; understand and appreciate the inherent risks of private development. City leaders need to understand and be willing to take risks.
- Bring value to the private development. Actively pursue mixed-use developments as part of public-private partnerships. Although the public participation is often through investment in parking, public spaces, landscaping and other basic infrastructure, don’t just assume that the need is monetary. There are many ways to provide value to the project:
- Ensure that city ordinances encourage mixed uses and provide flexible parking requirements.
- Provide expedited review and approval of permits – time is money.
- Provide a single point of contact within the city organization that can shepherd the private project and seek timely resolution of problems that inevitably will arise.
- Utilize the building codes and inspection team to perform feasibility analyses and reduce surprises.
- Make appropriate city staff part of the development team – mixed uses have challenging logistics such as garbage pickup, noise, odors and security. City staff can be great resources and should be involved in the very early stages of planning.
- Facilitate the staging of construction with flexibility in the use of public streets and rights of way for construction trailers, deliveries, etc.



- Provide encroachments for outdoor dining – to activate the street and also add revenue to the project. In Greenville, encroachments are regulated to ensure insurance and maintenance, but no fees are charged
- Seek creative financing options. Be willing to explore all financing opportunities – tax increment financing, hospitality and accommodation taxes, parking revenue bonds, New Market tax credits, Section 108 loans, grants, and even contributions.
- Commit to writing. Good agreements are essential. Clearly define expectations and responsibilities of each partner and commit everything to writing. Educate the private sector in the transparency of the public process and patience required. Be realistic about time commitments and do what you say you are going to do.
- Integrate with the existing environment. Through design requirements, ensure that the mixed-use development becomes integrated and linked with downtown, and not just a stand-alone project.
- Little things matter. Attractive landscaping, seating, lighting, and sculpture alone will not make things happen, but they do provide a backdrop, sense of place and identity to set the stage for private developments.
- Plan for people. The physical environment should first and foremost be designed and programmed to encourage its use by people. While the architecture is important, it shouldn't overshadow the ultimate goal of comfort and interest for the people who will be the most important part of the development.

Greenville developers have explained that, the partnerships have not always been easy. “The City has studied other communities and what they did for best practice research. But more often than not, we've learned from our mistakes. I think one of the best things is that we have a good City Attorney and outside counsel. The outside legal help representing the City has been very helpful. We've also committed everything to writing so if questions do come up, we always refer to the development agreements.” (Information obtained from questioning Mary Douglas Neal, AICP, Downtown Development Manager) Improving communications and continuing to build trust are other issues that the Greenville area is grappling with. Ways that the area has found to build trust is through co-sponsoring activities together, being inclusive of several organizations and continuing to promote and celebrate examples of private/public partnerships and collaboration.

Kathy Williams at South Carolina Association of Counties (SCAC) introduced examples from their Resource Guide. Below are three examples from the guide that relate to economic development and intergovernmental collaboration.

Other intergovernmental collaboration examples:

Aiken County

In an effort to keep jobs and attract others, Aiken County established a new relationship with the U. S. Department of Energy's Savannah River Site (SRS), the county's largest employer, and signed an agreement with the S. C. Research Authority in 1993 to develop and market a research park. With land donated by SRS, the Savannah River Research Campus (renamed the Carrol H. Warner Memorial Park) was approved by the county planning commission in 1994. The research park is unique in that it is the only such park in the state owned and managed by the county. The



campus is not only important to Aiken County, but equally affects the region, including Augusta, Georgia and Barnwell County. The support of citizens in the region was instrumental in seeing the project through. County officials have negotiated with national, state and regional organizations to locate in the park. Besides providing alternate types of employment and helping industry participate in technology transfer, the citizens that move to the area tend to make higher salaries and thus contribute to the tax base. They also participate actively in the life and work of the region. The research park was funded by the county through a \$3 million general obligation bond and a \$1.25 million grant from the Economic Development Agency of the U.S. Department of Commerce. A road between the campus and SRS was built using funds by Aiken County and the S. C. Coordinating Council for Economic Development. The project was a true partnership between county, state and federal governments, as well as private industry. The County took further advantage of the site by building a Government Services Center on the campus to better serve residents in that area of the county. It includes an EMS substation, magistrate's office, health services, law enforcement, recreational complex, and recycling site.

Charleston Regional Development Alliance

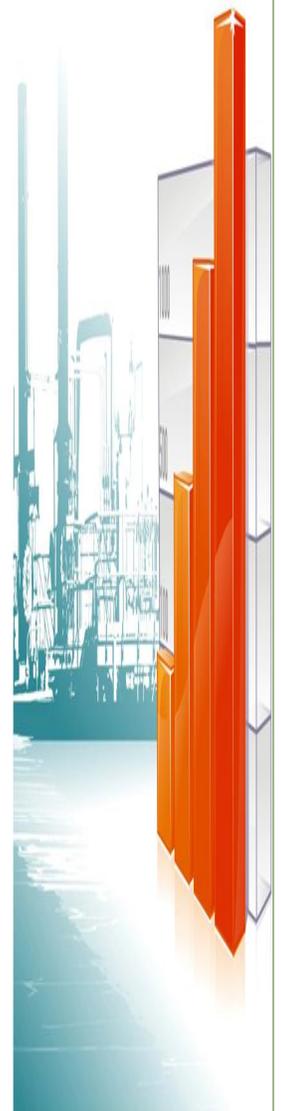
The Charleston Regional Development Alliance was created in 1995 by community leaders in Berkeley, Charleston and Dorchester Counties in an effort to spur economic growth and offset the impact of the Charleston Naval Base closing. Headquartered in North Charleston, the Alliance operates from a regional perspective rather than as three separate counties in attracting business and industry. Its board includes 23 members: each of the three counties appoints three members; each county chamber of commerce appoints three members; and the five largest cities within the three-county area appoint one member each. No single county can have more than 50 percent representation on the Board. In its first year, the Alliance netted \$910 million in capital investment. The Alliance enjoys both public and private support, with a per capita formula used to determine county contributions, and fundraisers by the three chambers of commerce to solicit business contributions. The success of the Alliance owes to the fact that its leaders realized that when a business locates in one county, it benefits the other counties, too. Economic development not only helps the tax base of the region, but it creates jobs and a stronger local economy.

Orangeburg County

A review of statistical data and its status as a "least developed" county led Orangeburg County and the City of Orangeburg to develop a joint industrial park. The concept was initiated with a team approach in 1995. The County incurred costs associated with land acquisition, and the City's Department of Public Utilities contributed \$4.7 million to bring infrastructure to the site. Once completed, the park was transferred to a seven-member commission (comprised of city/county officials) to own and oversee its operation. An 80,000 square foot shell building on site made it possible to immediately attract industry.

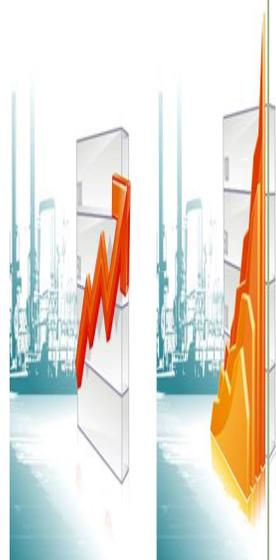
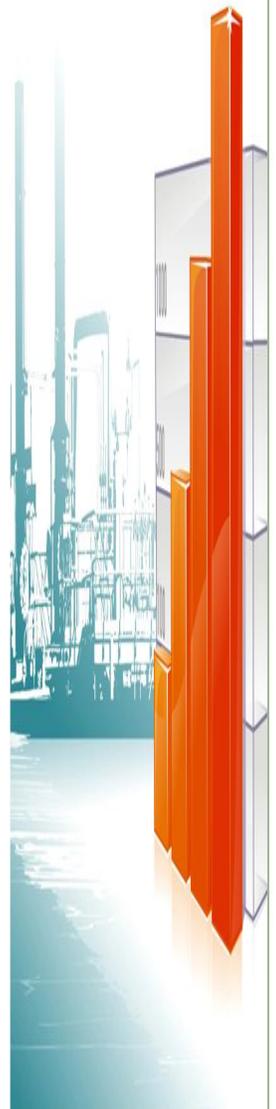
Other States: Florida

Jacksonville, Florida; had an intergovernmental coordination comprehensive plan that was developed by the Mayor, city council and their planning and development department. Kenneth M. Pinnix Chief, Community Development Division & Brownfield Program Manager gives some examples of partnerships that the city has developed over the past years. "The City of



Jacksonville's Brownfield partners with the Environmental Protection Agency with leveraging of funds to identify remediate and assist with redevelopment of environmentally sensitive sites that have sat vacant and undeveloped. Typically, Brownfield sites may or may not have an environmental concern but can still utilize various incentives for redevelopment. The City also partners with the state, including agencies such as the Office of Trade, Tourism and Economic Development (OTTED), Enterprise Florida (Florida's Economic Development Agency) and the Florida Department of Environmental Protection.” (Pinnix) This city also has a blueprint for prosperity plan, which has approximately 340 partner’s active in the development process.

Intergovernmental collaboration and public/private partnerships are a continual process, which has to be worked on. Issues of forming trust and better communication take time and patience. Places like Greenville have worked on these issues for at least 30 years and are constantly continuing to forge stronger relationships. By starting at the left side of the collaboration continuum, Horry County would set the stage for more partnership participation. Collaboration is key to successful economic development.



CULTURAL ASSETS

3.1 Identify and organize information on local cultural resources and opportunities

- a) Support Horry County Arts and Cultural Enhancement (ACE) in the organization, management and funding of cultural assets.
- b) Locate and secure a facility for operational support.
- c) Provide for future expansion of facilities to include strategically located satellite kiosks and information stations.
- d) Create the funding necessary for program facilities and required staff.

3.2 Encourage and nurture growth and diversity of public and private cultural assets

- a) Promote the value of partnerships and collaborations among arts organizations and their communities;
- b) Support city, county and state community efforts to utilize arts to attract and grow business
- c) Promote cultural tourism as a core strategy for economic development;
- d) Partner with area chambers and business organizations to promote tourism as an arts destination;
- e) Create an artist's incubator and associated cooperative organizational structure;
- f) Identify public and private funds for incubator facility acquisition where artists have private, below market rate studios and shared common exhibition spaces;
- g) Offer business training programs to creative artisans with interest in sustaining both virtual and actual studio space;

3.3 Facilitate the development of expanded eco-tourism and outdoor recreation business opportunities in both coastal and inland areas of the county;

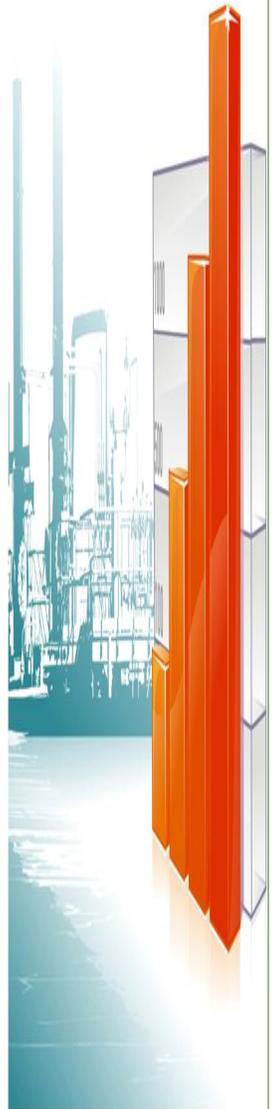
- a) Develop an eco-tourism marketing campaign that targets specific markets and demographics;
- b) Work with state and local tourism entities to develop and implement the campaign;
- c) Maintain eco-tourism niche small business training programs in support of new entrepreneurial enterprise development;
- d) Work with local and state tourism entities and higher education institutions to complete an eco-tourism product development concept including: access, infrastructure, business expansion, new business opportunities, and a resource inventory

3.4 Enhance K-12-curriculum centered on local/state/regional cultural significance;

- a) Work with Horry County Schools to ensure continued support for arts programs as part of the overall curriculum;
- b) Establish a business and arts partnerships that showcases art created in schools in both public and private business settings;
- c) Create an arts mentoring program that transitions student artisans with identified skills into developmental training programs or workforce opportunities that nurture creative skills;



- d) Sponsor an arts education scholarship that makes additional training possible for local students that wish to develop their creative skills into a career;
- e) Create incentives for teachers to participate in Arts in Education programs;



EDUCATION

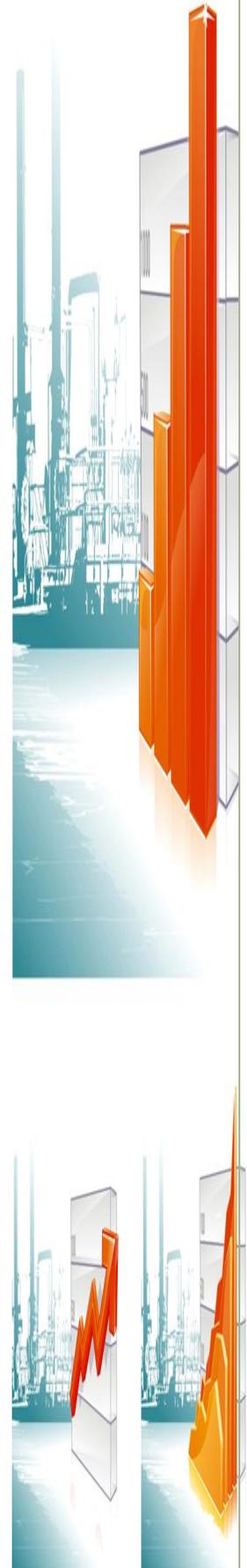
4.1 Ensure that every community recognizes the value of education and the need for all public and private schools to prepare students to be competitive in the rapidly changing world of the 21st century.

- a) Create organized forums through which greater parent teacher communication may be fostered;
- b) Utilize resources available through local faith-based and community organizations to sponsor parent/teacher engagement activities and programs;
- c) Work with the local and statewide industry organizations to market opportunities in the manufacturing sector to students, parents, and teachers;
- d) Collaborate with local Chamber of Commerce, business and industry organizations to host an annual job fair focused on workforce opportunities in career clusters identified by the Education and Economic Development Act (EEDA);
- e) Engage local utility providers and community business leaders in the support of a Business and Education Partnership that supports an emphasis on math, science and technology curriculum and creates greater awareness of affiliated career clusters;

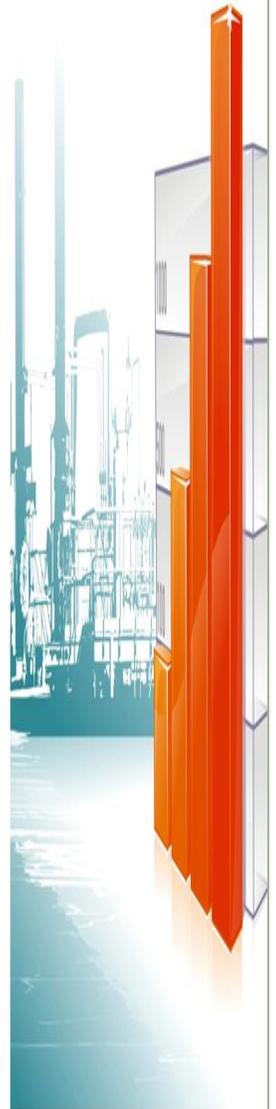
4.2 Ensure that students are work and college ready, prepared for literacy in a digital age, prepared to be critical thinkers and are prepared to be effective communicators.

- a) Conduct an educational needs assessment and gap analysis of local employers;
- b) Conduct staff development programs that make connections between 21st Century skills, workforce demands, and curriculum attributes;
- c) Evaluate existing curriculum for consistency with current and future workforce needs and modify accordingly;
- d) Partner with local higher education institutions to maintain and expand early college high-school and scholars academy programs;
- e) Work with the Academy for Arts, Science, and Technology and the Academy for Academics and Technology to offer innovative science, math and technology based curriculum and certifications that meet the needs of regional employers;
- f) Develop dual enrollment opportunities at local higher education institutions in support of both the K-16 education model and employer demands in the workforce;
- g) Sustain continuing education opportunities that inform career counselors about opportunities associated with all career clusters identified by EEDA;
- h) Make GED programs accessible to all participants through the development of education and employers partnership programs;
- i) Form a Higher Education Partnership that formalizes existing relationships between Horry County Schools and local institutions;

4.3 Work with economic development entities and business organizations to market the achievements of programs in Horry County's public and private schools and make the fundamental connection between education and economic prosperity;



- a) Develop a marketing campaign for premier achievements and unique program opportunities in public and private school systems;
- b) Maintain benchmark achievement data that may be utilized by economic development entities to highlight the quality of local schools systems
- c) Work with local and regional economic development organizations to articulate the importance of education to workforce and entrepreneurial development; produce digital marketing materials that may be used in economic recruitment activities;
- a) Work with through higher education partnership to highlight K-14 comprehensive educational opportunities in the County;
- b) Market opportunities and achievements in special needs and other niche education program available through public and private school systems;
- c) Produce a categorized education opportunities piece that identifies all program offerings in primary, secondary, adult education, continuing education, and alternative education sectors;



HEALTHCARE

5.1 Form a healthcare consortium that focuses on community wellness and prevention, decreases health disparities, improves access and increase availability of specialty care.

- a) Conduct a community needs assessment to identify consistent healthcare indicators that may be used to address needs through collaborative outreach;
- b) Develop collaborative outreach programs focused on mitigating issues identified in the community needs assessment;

5.2 Partner with educational institutions to expand the variety of health careers and educational programs currently offered.

- a) Work with local higher education institutions to create and promote additional healthcare training programs to meet the needs of the growing healthcare sector;
- b) Establish a partnership among local hospital systems, CCU, HGTC and SC Hospital Association that identifies training program needs and opportunities;
- c) Explore the utilization of cutting-edge medical technology and practices such as telemedicine and virtual surgery; develop training programs in support of such initiatives;
- d) Conduct a needs assessment of educational program offerings at all local institutions and develop programs to fill training gaps;

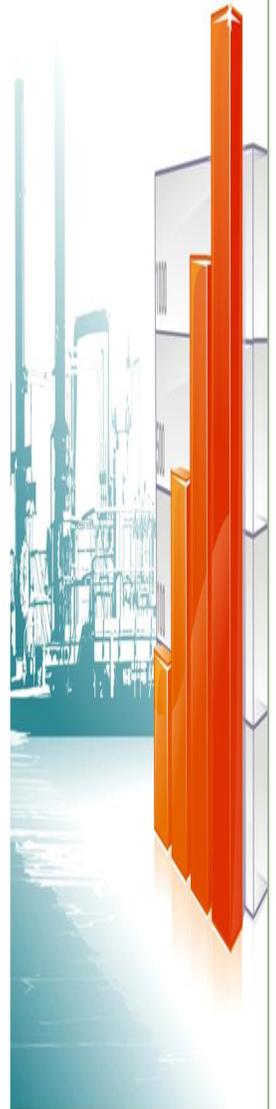
5.3 Create a resource guide for the general public and healthcare providers outlining all available healthcare resources in the county.

- a) Establish a coalition of all healthcare service providers including the United Way and the American Red Cross that provides printed healthcare resource guide in local libraries, post offices and online;
- b) Work with a coalition of healthcare service providers to develop a web-based community healthcare portal that serves as a singular resource for all healthcare related information in the county;

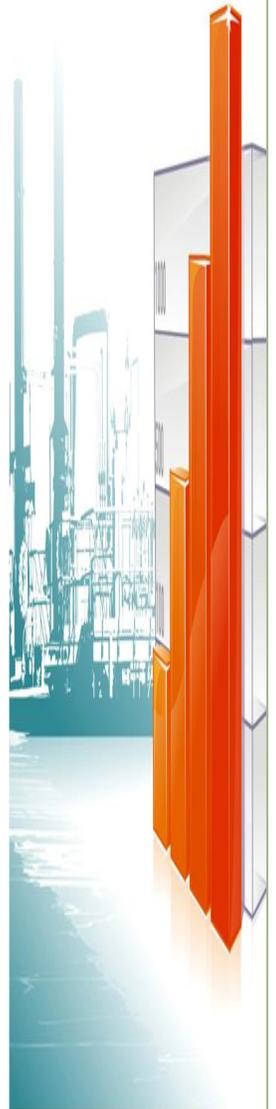
5.4 Establish a plan to increase fiscal support through local/state legislature, public and private sector foundations and grants to increase capacity to serve underinsured;

- a) Work through a local healthcare coalition to seek network funding in support of identified needs;
- b) Work with the SC Hospital Association to educate local and state policy makers about community healthcare needs and plan for the equitable application of funding resources in response to such needs;

5.5 Increase healthcare industry capacity in Horry County to meet growing demand and create quality jobs and strategically located facilities.



- a) Conduct a study that establishes an empirical connection between residential and commercial growth and the expansion of the healthcare sector locally; use study to support the creation of new jobs and service opportunities in the healthcare sector;
- b) Work with healthcare partners and community organizations to acquire necessary funding for facilities that offer primary and preventative healthcare programs and services to serve uninsured and underinsured populations.



INFRASTRUCTURE

6.1 Develop sufficient revenue resources to enable public infrastructure to be used as a competitive advantage with respect to economic development;

- a) Study the development and application of an alternative equitable tax structure to accommodate targeted growth;
- b) Encourage the development of a written financial plan for the construction and maintenance of county infrastructure;
- c) Build political support for capital investment in the proposed airport and marine industrial parks and other infrastructure dependent economic development initiatives;
- d) Make targeted infrastructure investments in areas identified for business growth;

6.2 Maintain state of the art communication technologies and encourage leading-edge communication technologies;

- a) Work with technology service providers to identify community best practices related to the provision of cutting edge communication technology infrastructure;
- b) Target new industry recruitment and entrepreneurial start-ups with consistent communications technology needs;
- c) Build a model technology district with associated communications technology in strategic areas of the county;

6.3 Expand public safety services county-wide (fire, police, EMS, and judicial);

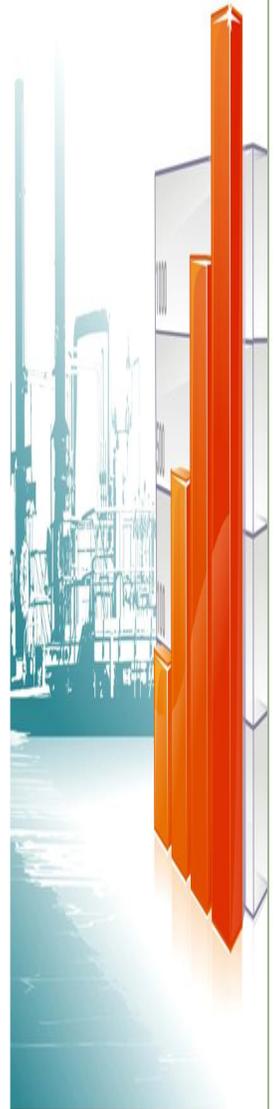
- a) Support the expansion of police, fire, and emergency medical services staffing and pay levels in order to maintain a highly qualified professional personnel;
- b) Determine best practices associated with the provision of county-wide public safety services and index current levels of service with desired level of service;

6.4 Protect natural water resources through high levels of waste water treatment and stormwater control and maintain sufficient water supply for public consumption and fire protection;

- a) Determine water resource needs necessary to accommodate expanded residential, commercial and industrial capacity and growth;

6.5 Encourage the generation and utilization of environmentally sensitive, cost-effective electrical power and alternative domestic fuel sources;

- a) Study the utility infrastructure needs for target industry models and provide necessary transmission systems;
- b) Utilize alternative fuel source transmission systems as marketable asset when recruiting industry to specific sites;
- c) Study the design of a lead certified smart park that meets the specific infrastructure needs of target industries;



- d) Engage state research institutions in order to pilot innovative alternative fuels source and transmission programs at industrial park facilities;
- e) Utilize relationships with research institutions to market industrial park locations as industry/research cluster opportunities;

6.6 Coordinate and facilitate the development of workforce housing to help attract new industries and larger scale businesses;

- a) Facilitate the location and development of workforce housing in close proximity to new industrial and business sites;
- b) Encourage the location of new workforce housing developments with the development community and local planning offices;
- c) Coordinate workforce housing locations with public transportation services to minimize the impact of additional daily home to work trips.

TECHNICAL REPORT 6: FUNDING INFRASTRUCTURE

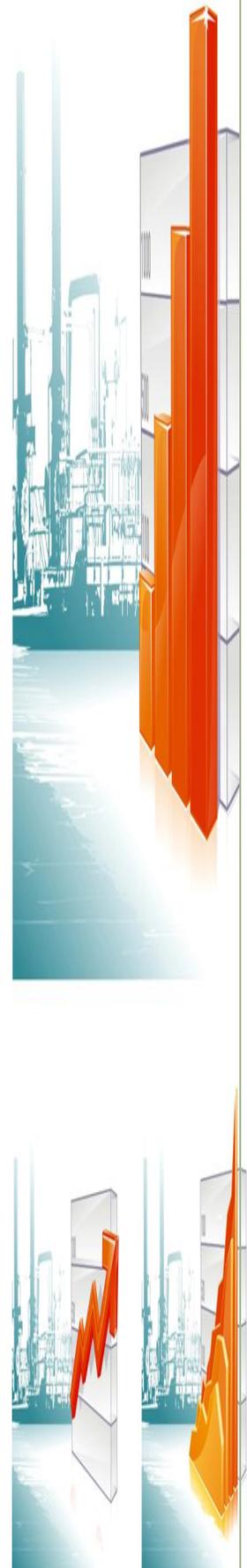
Whether dealing with private utility expansion or public service infrastructure provision, the inevitable question that arises concerns how to fund such capacity in concert with desired economic growth. This report presents information about county revenues in general. It then looks at a few of the fastest growing counties in the Southeastern Regions and their revenue streams. The report concludes by summarizing these revenue streams.

County Revenues:

The state constitutions and statutes determine where their revenue resources can come from for counties. For the majority of counties just under a half the states allow counties to impose a sales tax. Only in Indiana and Maryland is a tax on income a significant county revenue source.

According to the 2002 Census of Governments, conducted by the U.S. Census Bureau, county governments receive just 3 percent of their overall revenue from the federal government. Collectively, counties receive 33 percent of their total revenue from their own home states. Finally, 61 percent of their budget revenue is generated from their own sources. Property taxes account for the largest source, 40 percent; of these self-generated funds the remainder of the revenue is composed of other taxes and fees. Property tax continues to be a basic income generator for the 25 largest county governments, although the most recent data shows a noticeable fluctuation in this reliance. Fairfax County, VA reports that 41 percent of their revenue comes from property taxes, while Orange and San Bernardino Counties report that only 9 percent of their revenue is from this tax. On average, the top 25 counties report that nearly 22 percent of their revenue comes from property taxes. (<http://www.naco.org>)

General and selective sales taxes account for almost 13 percent of self-generated revenue. However, the 2001 National Association of Counties Study County Revenue Patterns: A Survey of Authority Practices showed that the following states with a state sales tax do not permit local government to levy a local sales tax: Hawaii, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Jersey, Rhode Island, and West Virginia. More than half of the counties who



responded to the survey reported sales tax as a percentage of the government's revenue.
(<http://www.naco.org>)

For the largest 25 counties, state aid provides a larger percentage of revenue than property taxes. Riverside County, Calif. received 60 percent of this revenue from state aid. The receipts from direct state aid averaged nearly 35 percent of total county revenues.
(<http://www.naco.org>)

Below are examples of the fastest growing counties in the Southern region and information of how they generate their revenue which they utilize for physical infrastructure development and other developmental uses.

Three of the top fastest growing counties in the Southeast region are:

- Loudoun County, VA
- Forsyth County, GA
- Henry County, GA

Loudoun County, VA:

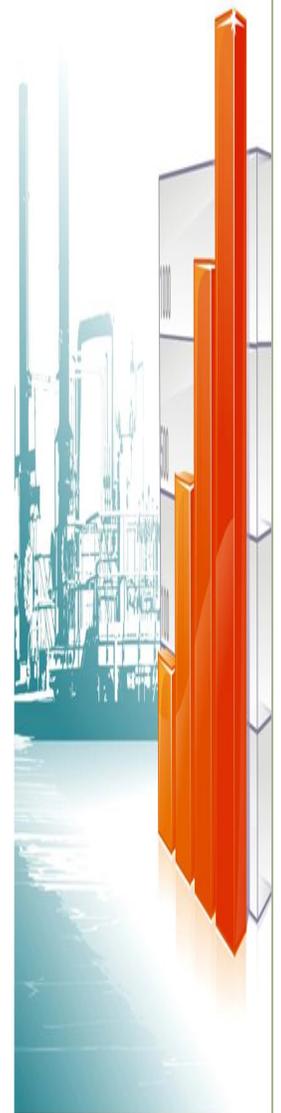
Loudoun County is located 25 miles west of Washington, DC, in the Washington Metropolitan Area. Since the construction of the Dulles International Airport, new business and residential development have dominated the County's historically agricultural economy. Loudoun County's population nearly doubled in the 1990's; since 2000, Loudoun County has been one of the fastest growing counties in the United States. The County's economy continues to grow, and is responsible for a considerable share of northern Virginia's job growth during the past few years.

Several major companies in the telecommunications, information and airline industries are located in the County. Known for its outstanding public school system, the County provides a mix of suburban and agricultural living to its residents.

General Fund revenue is divided into five major categories. These include (1) General Property Taxes (2) Local Non Property Taxes (3) Other Local Sources of Revenue (4) Commonwealth Aid and (5) Federal Payments. General property taxes comprise the largest source of General Fund revenue. The County also collects substantial revenue from the local sales tax, business professional and occupational license (BPOL) taxes, land development fees and aid from the State and Federal governments.

General Fund:

This category refers to real property taxes and personal property taxes, and is projected to constitute about 72% of all General Fund revenue in FY 07. Real property taxes are levied on the assessed value of real estate property owned by businesses, individuals and public service corporations (PSC). Personal property taxes are levied on the assessed value of tangible property such as vehicles, mobile homes, heavy equipment, machinery and tools. Real property tax assessments are conducted by the County Assessor, while personal property assessments are conducted by the Commissioner of the Revenue. Both real and personal property taxes are



levied on 100% of assessed market value. Rates are established per \$100 of assessed value. Both real property and personal property taxes are collected semiannually.

Real Property:

For FY 07, the Adopted Fiscal Plan includes a countywide real property tax rate of \$0.89. The County also levies supplemental real property taxes on properties located within three special improvement districts (Aldie, Hamilton, and Route 28). Revenues from these districts are dedicated to specific purposes for which separate funds have been created.

In FY 02, the real estate tax liability on qualifying elderly and disabled residents was reduced from 2% of gross household income to 0%. In December 2004, the program's thresholds for household income and net worth were increased (to \$72,000 gross combined income and \$340,000 net financial worth – excluding primary dwelling and associated land) as allowed by 2004 General Assembly action. The reduction in the real estate tax liability was also extended to the home plus three acres, rather than the previous one acre.

Real property taxes are paid by owners of residential, commercial/industrial, and agricultural property. County policy continues to emphasize the accelerated development of commercial and industrial property needed to provide the revenue required to maintain service standards for the County's residential communities.

Personal Property:

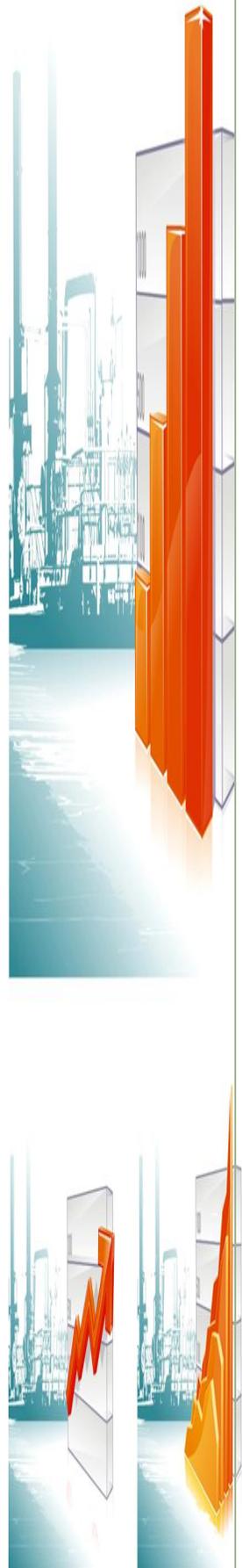
Personal property taxes are levied at rates dependent upon the classification of property. Beginning in FY 1999, the State began a phased reduction of personal property taxes on the first \$20,000 in value of private vehicles. During the 2004 State General Assembly session, the reduction was held to 70%, with the foregone revenue reimbursed to localities. Beginning in 2006, the State's reimbursement to localities is capped, and the reduction on each citizen's tax bill could decline over time.

There are three special programs that reduce the personal property tax rate on vehicles: volunteer fire & rescue, elderly & disabled, and special fuels. Personal property belonging to members of volunteer fire and rescue companies and/or auxiliary companies is taxed at \$0.01 per \$100 assessed value, while such property belonging to elderly and disabled resident is taxed at \$2.10 per \$100 assessed value. The 2004 General Assembly allowed localities to establish a separate category and tax rate for "clean special fuels" vehicles, such as hybrid and alternative fuel vehicles. Beginning in 2005, the Board of Supervisors established a new special fuels tax rate of \$0.01.

Public Service Corporation Real and Personal Property Taxes:

Public service corporations (PSC) are utilities. The State Corporation Commission assessed the real and personal property of utilities, except for vehicles. By State law, most PSC property (both personal and real) is taxed at the locality's real property tax rate. Aircraft, automobiles, and trucks are taxed at the property tax rates of \$4.20 (automobiles and trucks) and \$0.01 (aircraft) per \$100 in assessed value.

Local Non-Property Taxes:



Local non-property tax revenue includes a variety of local tax revenues independent of general property taxes. The largest single item in this category is the local sales and use tax, which is derived from one-fifth of the 5% State sales tax on retail sales in the County. Local sales tax revenue is budgeted at \$44.5 million in FY 07.

The County levies a tax on consumer utility purchases, such as natural gas, electricity, and telephone service. Consumers pay these taxes on a monthly basis to their utility companies. The collected revenue is subsequently remitted to the County. Consumer utility tax rates vary based on the type of user. The Board extended the consumer utility tax to include cellular telephones beginning in FY 02. Revenue from this initiative is dedicated toward offsetting expenses associated with operation of the County's E-911 system. Anticipated revenue may be found in the narrative for the Public Safety Communications Fund. A flat fee of \$2.00 per telephone number also provides revenue for the operation of the County's E-911 emergency dispatch service.

Loudoun County levies a Business, Professional and Occupational License (BPOL) tax on businesses located within the County. This revenue category is projected to yield \$23.5 million in FY 07. BPOL tax rates vary according to the category of business. An individual business's obligations are calculated by applying the applicable rate to its gross receipts from the preceding calendar year. In FY 02, the Board increased the license rate for contractor business, professional and occupational licenses to the regional average of \$0.13 per \$100 gross receipts. Beginning in FY 00, those businesses with annual gross receipts less than \$200,000 became exempt from the gross receipts component of the BPOL tax, but these businesses still pay an annual fee of \$30. BPOL rates are listed with the categories' budgeted revenues.

As the exclusive franchiser for the County's cable television system, the County collects cable franchise license fees from the County's cable franchisee.

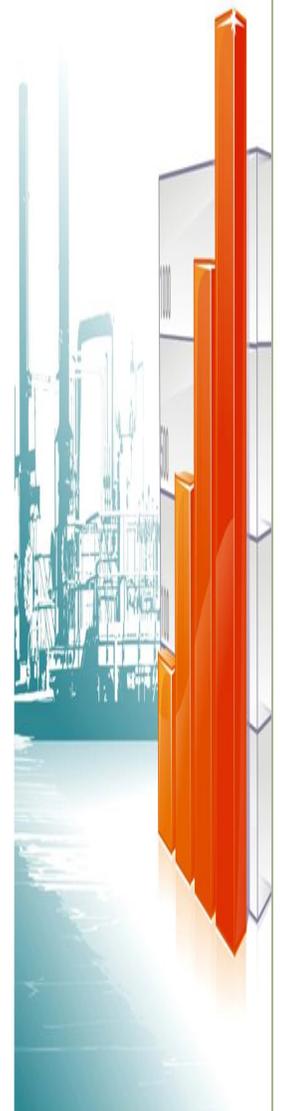
The County receives motor vehicle license taxes for the issuance of decals by the Office of the Treasurer, in connection with enforcement of the County's personal property tax program. Bank franchise taxes are collected for the issuance of franchise licenses to banks that desire to operate branch offices in the County.

Recordation taxes are levied on transactions involving the recording of estates, deeds of trusts, mortgages, leases, contracts and agreements that are required to be admitted as matters of record to the Clerk of the Circuit Court. Taxes on wills are levied on matters of probate. Revenue associated with this category is collected by the Clerk of the Circuit Court and remitted to the General Fund.

Hotel and motel taxes include a portion of the transient occupancy tax levied on limited-stay facilities. Of the 5% tax, 2% is allocated to the General Fund. The remaining 3% is deposited in the Restricted Use Transient Occupancy Tax Fund. A discussion of this fund may be found in the Other Funds section of the Adopted Fiscal Plan.

Permits and Privilege Fees:

Permit and privilege fees include a variety of revenues associated with the collection of fees, permits and licenses. Land development fees constitute the preponderance of revenue allocated



to this group. Revenues associated with the licensing of various facilities and domestic animals also are posted to this category. In 2005, the Board of Supervisors approved a false alarm ordinance, allowing the County to charge fines for false alarms.

Fines and Forfeitures:

This category includes revenue received primarily from motor vehicle and fire land citations.

Use of Money and Property:

This category includes revenue received from the investment of General Fund balances. In addition, revenue is received from the rental of County facilities for public use and from the sale of concessions at various events. Interest income is expected to rebound with rising low interest rates.

Charges for Services:

The County collects fees for a wide range of services provided to various customers. Fees are collected for court activities, day care and health services, emergency activities, parks and recreation programs, sales of County maps, animal control programs, and disposal of waste at the County landfill.

Miscellaneous Revenue:

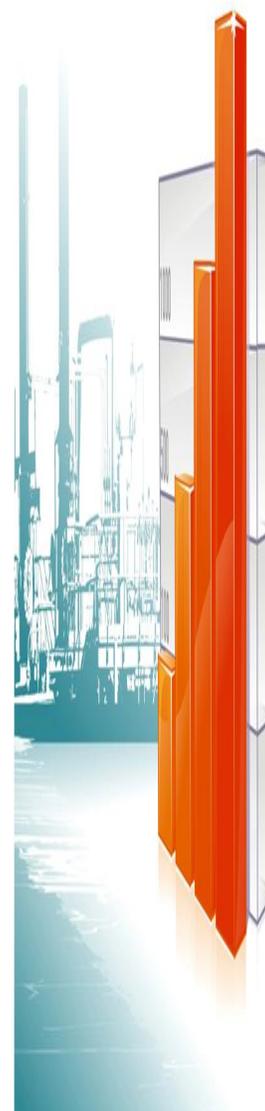
Revenues allocated to this category are those that do not belong in any other local revenue category. Other revenues included in this group include monetary gifts from private donors (typically made to County libraries, community centers, or recreation programs), collection charges on returned checks, and reimbursement by individual users for damage to County library material.

Recovered Costs:

The County receives reimbursements from other entities for services performed on their behalf. For example, fees are collected from the State for housing prisoners convicted under State law in the County’s detention facilities. In addition, incorporated municipalities within the County provide reimbursements for services provided in support of municipal elections, criminal prosecutions, extraditions and other matters. The County also receives payments from insurance companies and the Federal government for medical services provided under the auspices of County programs.

Other Financing Sources:

The County receives revenue from the sale of assets and issuance of bonds and leases for capital and facilities improvements. The capital lease revenue in FY 07 represents lease-purchase financing for the replacement of the MH/MR/SAS client system and development of a new time and attendance system. This category also includes transfers from various other funds. For FY 07, transfers are proposed from the Comprehensive Services for At-Risk Youth and Families (CSA) Fund for program management and from the Local Gasoline Tax Fund to support County transportation and transit-related services.



The State provides general support to municipalities through a variety of revenue generating mechanisms. A portion of profits realized from the sale of wine and liquor at the State's Alcohol Beverage Control (ABC) Commission stores are distributed to municipalities on a quarterly basis, using U. S. Census data. The County receives a 3% tax on mobile home title filing and 50% of the revenue collected by the Clerk of the Circuit Court for the filing of deeds of property. In lieu of personal property tax revenue, the County receives a 4% daily vehicle rental tax (formerly referred to as sales and use tax) on vehicles rented within the County.

Payments by the Federal government to the County are divided into two categories: (1) Payments in Lieu of Taxes and (2) Federal Categorical Aid. These sources of revenue are described below.

Payments in Lieu of Taxes:

The County receives a payment from the Federal Bureau of Land Management for a tax-exempt parcel in Leesburg housing a regional trafficking center for the Federal Aviation Administration. The parcel's classification under Federal law as "entitlement" land requires a formula-based payment in lieu of taxes.

Federal Categorical Aid:

Federal aid received by the County is principally of the categorical type. Examples of programs received Federal assistance include foster care, refugee assistance, drug and alcohol abuse programs, low income housing assistance, employment assistance, Medicaid and Aid to Families with Dependent Children.

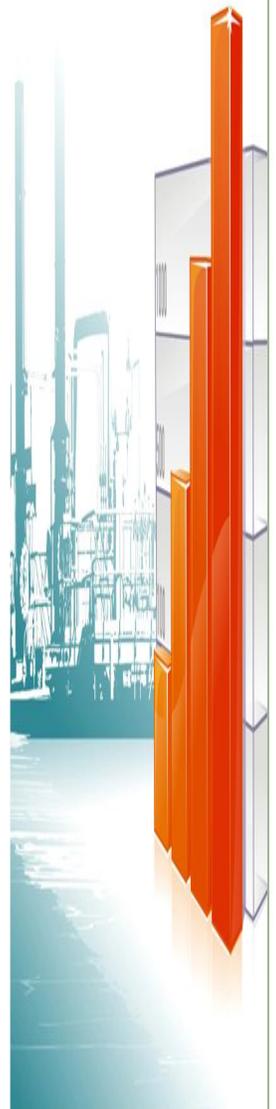
Forsyth County, GA:

Forsyth County is situated approximately 40 miles north of Atlanta and covers an area of 247.4 square miles. It is a virtual blend of rural and urban lifestyles. Has had a 123% growth rate, to 98,400 residents, in the year 2005 and was the fastest in the state and the fifth fastest in the country according to the U.S. Census Bureau, 2005. And that growth does not appear to be abating. The U.S. Census Bureau's Population Estimates for 2005 is 140,393. According to the ARC (Atlanta Regional Commission) Forsyth County's population is expected to exceed 400,000 by 2025.

Due to the continued growth in the County's sales and property tax, revenues continue to increase. However, the increase in revenue dropped significantly due to the economy and the property tax freeze on residential parcels approved by voters in 2000. The growth in the net digest for 2006 tax bills (which finance the 2007 budget) was only 8.7%. The General Fund, at \$71.7 million, is the largest fund in the County. It provides the funding for most of the County's departments. The General Fund's primary source of revenue is taxes and the Local Option Sales Tax (LOST) at \$20 million and property tax at \$24 million are the main components of this source. They account for 80% of the revenue.

General Fund revenues consist of the following:

Taxes and Commissions are collected by the Tax Commissioner's office and the state of Georgia. Taxes collected are for property taxes, motor vehicle taxes, alcohol excise taxes, sales taxes, and



business and occupational taxes. There are also commissions paid on taxes collected by the County on behalf of the state and other governmental entities.

Licenses and Permits fees are collected for business licenses and permits, and licenses for alcohol, marriages and firearms. Permits for building and improvements are also part of this section.

Courts and Law Enforcement revenues generated by courtroom activities, such as fines and forfeitures, are collected and used for the general fund where these activities are located.

Intergovernmental Revenue comes from Federal and State grants that provide income to local governments to fund special programs or for capital funds to purchase equipment.

Charges for Services are revenues from the various functions of government that charge a fee. Inspections, investigations, county costs, bench warrants, transportation, parks and recreation fees all come under this category.

Other Revenue consists of rental income, investment income and other small sources of revenue.

E-911 Fund receives funding from a tax levied on all land and cell phones in the County. The revenue is adequate to support all needs in the fund. Other governmental funds of the County are small totaling \$1.1 million.

Transfers from Other Funds are revenues transferred from other funds to pay for services provided by the General Fund.

Carry Forward Funds are used to overcome shortfalls when expenditures exceed revenue.

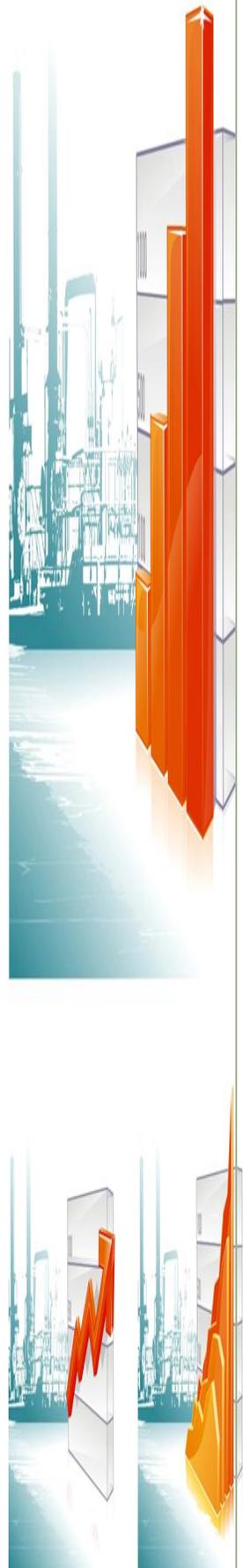
Henry County, GA:

Georgia's 50th county is located approximately 30 miles southeast of the City of Atlanta, and is considered part of the metropolitan Atlanta area. Henry County is strategically located along I-75 with a total of seven interchanges within its borders. With a low cost of living, temperate climate and easy access to Atlanta, Henry County provides all the conveniences of a large city, in a small town atmosphere. State and national economic indicators place Henry County in an enviable position as one of the nations' fastest-growing communities, and in fact, between 2000 and 2006, Henry County has been the 2nd fastest-growing county in Georgia, and the 8th fastest-growing county in the nation.

Property Taxes, Sales and Use Taxes and Charges for Services combine to make up 87.12 % of budgetary funding, with Property Taxes making up over half, 54.66 %, of the County's resources. Also, Licenses & Permits, Fines & Forfeitures, Grants, Reimbursements, and Misc. Revenues make up the remaining 12.88%.

Lease Purchase Fund

In fiscal year 2004, Henry County created the Lease Purchase Fund to track lease purchases separately from any other capital projects fund. Henry County enters into lease purchase agreements for the purchase of land, equipment, vehicles, and buildings through an agreement



between the Association of County Commissioners of Georgia (ACCG) and Wachovia Bank. During 2007, Henry County entered into three new lease purchases totaling \$7,445,411. One lease was for the purchase and renovation of a new County annex building being used to house the fire and police administration personnel. The second lease was to purchase 10 resources officer cars for the Sheriff. The final lease was for vehicles and equipment used by the entire county.

Capital Assets

Henry County's investment in capital assets as of June 30, 2007, amounts to \$470,662,394 (net of accumulated depreciation). This investment in capital assets includes land, buildings and systems, improvements, machinery and equipment, park facilities, roads, highways, and bridges.

General Fund

At June 30, 2007, the County's General Fund reported an unreserved fund balance of \$49,509,159, a decrease of \$1,372,781, or 0.97 percent, from the last fiscal year. The total General Fund balance, including \$1,458,960 in reserved fund balance, is \$50,968,119.

SPLOST

The 2002 Special Purpose Local Option Sales Tax (SPLOST) generated collections of \$30,499,217 during Fiscal Year 2007.

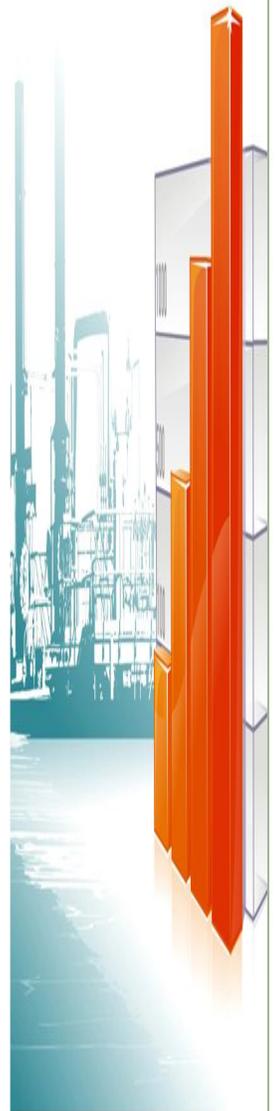
Impact Fee

Henry County Impact Fee fund closed Fiscal Year 2007 with a fund balance of \$4,750,335, a decrease of \$1,166,168 or 19.7 percent from the last fiscal year. The decrease is due to funds used for the jail expansion and the new government annex.

Assets

Governmental assets installed during the year totaled \$88,659,360. The largest portion of the increase came from construction in progress. Henry County's SPLOST program is currently building capital projects and road projects that are at their peak of construction. The County purchased a building to become the new governmental annex with Impact Fee and general fund money that added to the construction in progress report as well. Property Taxes increased by \$5,728,374 (9.3 percent) during the year. Most of this increase is due to more professionals in the field appraising homes and improvement to homes.

Sales Taxes increased by \$3,071,817 (6.5 percent) during the year. This is mainly due to Henry County being one of the fastest growing counties in the United States. With new people coming to live in Henry County, the demand for consumables has increased. Also, with the addition of new retail complexes, many people from other areas come to Henry County to shop. Unrestricted investment earnings increased by \$1,283,712 (24.1 percent) during the year. Interest rates were cut near year end, but we were still able to maintain an increase again this year.



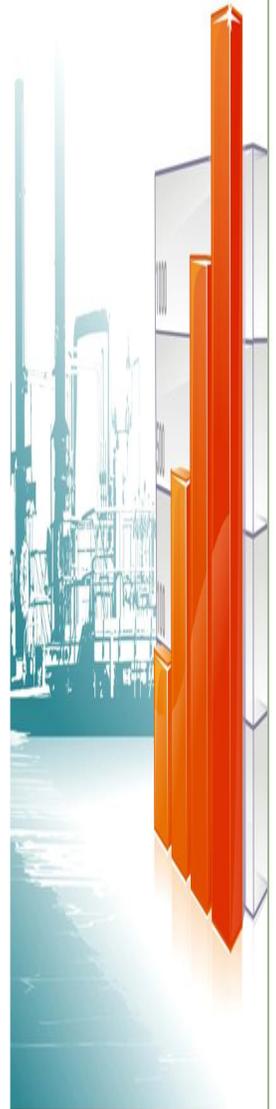
Henry County finds other creative ways to develop an inflow to their revenue stream, the County hosts several major sporting events each year, aiding in the export of our tax burden through our Local and Special Local Option Sales Taxes. Two major National Association of Stock Car Racing (NASCAR) events are held each year at the Atlanta Motor Speedway in Hampton.

Atlanta Motor Speedway accounts for more than half of metro Atlanta's total revenue derived from sports and were projected to bring in \$2.275 billion of the metro area's \$4.5 billion income from sports from years 2000-2006. On race day, Atlanta Motor Speedway holds in excess of 124,000 fans, making it one of the 10 largest cities in Georgia for the day.

Henry County also plays host each summer to the AABC Roberto Clemente World Series for 7-8-year-old baseball players, the 7-year-old Dizzy Dean World Series, the Independent Softball Association Youth Fast Pitch World Series, a BMX National Tournament, and Civil War Re-enactments at Nash Farm Battlefield, bringing thousands of families from around the country to the County. Currently, more than 21 hotel and motel facilities provide over 2,100 guest rooms throughout the County.

For accountability purposes, the County operates in a "fish bowl." That is, decisions are made in an open public forum and the County is accountable to its citizens while pursuing goals of efficiency and effectiveness.

Overall the general revenue sources for the majority of county governments have the same composition. The largest share of county government's revenue comes from property taxes which when combined with sales taxes usually make up the largest portion of their budgets. Other funds such as grants & intergovernmental collaborations also play a significant role. Revenue generated from other taxes & commissions, fines & forfeitures, licenses & permits and charges for services can also promote a prosperous budget. Finding ways to draw in business or a significant amount of tourist for short terms is a key factor to assist with revenue generation. All of these components should be given consideration when analyzing ways to generate revenue for Horry County.



NATURAL RESOURCES

7.1 Acquire ecologically sensitive and regionally important lands with significant natural resources and ecosystems for the protection of human and ecological benefits and services;

- a) Develop a county-wide land acquisition program based on prioritized/categorized tracts identified through the local open space programs;
- b) Work with local government entities and planning authorities to develop a multi-tiered open space linkage program that accounts for open space networks in all jurisdictions;
- c) Create a management plan associated with public properties identified for acquisition through open space planning efforts;

7.2 Maintain and ample supply of clean drinking water for while improving water quality of all surface waters and ground water sources;

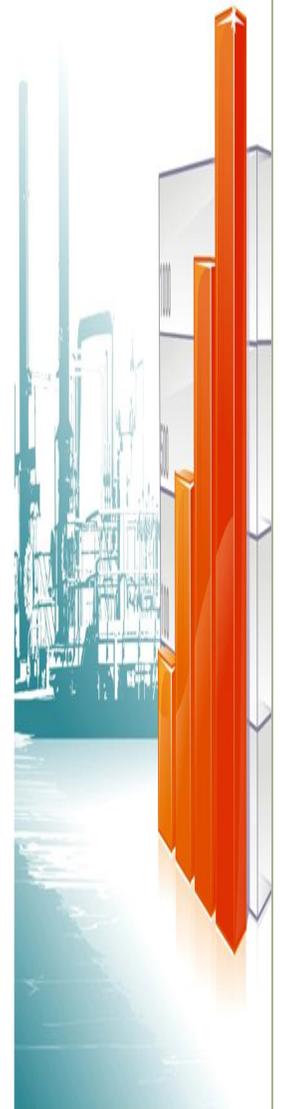
- a) Conduct a water resources study that assesses capacity and quality of all ground and surface water bodies, watershed resources and navigable waterways;
- b) Engage a consortium of water based business and institutional interests to sustain a water quality education program that seeks to mitigate impaired conditions in local water bodies;
- c) Develop a comprehensive water quality monitoring network for point and non point source pollutants in impaired water bodies;
- d) Organize a volunteer network of retiree stakeholders interested in the improvement of water quality and monitoring exercises (see Environmental Alliance for Senior Involvement, EASI);

7.3 Achieve an optimum ratio for diverse land use to include agricultural, forest open space, scenic areas, recreational lands, and sensitive ecological areas;

- a) Conduct a natural resource asset valuation study for all components of ecosystems that may be viewed as environmental capital with respect to the local and regional economy;
- b) Use innovative planning tools and other regulatory mechanism to prohibit the development of areas deemed to be of critical importance to local ecosystem;

7.4 Reduce pollutant contributions from point and mobile source air pollutants;

- a) Convene a Green Industry Council to oversee the implementation of incentives, credits and opportunities related to the pursuit environmentally sensitive business practices;
- b) Identify renewable energy and fuel opportunities that may be harnessed by local business and industry;
- c) Conduct an organized public awareness campaign associated with all pollutants to local ecosystems highlighting that connection between economic development and environmental quality;
- d) Ensure accuracy and accountability of data maintained by state and local environmental agencies;



- e) Conduct an epidemiology study in support of the connection between environmental quality and prevailing health issues; use information to mitigate negative circumstances and as leverage to strengthen policies affecting the environment;
- f) Administer Green Certification Program to reward pursuit of environmentally sensitive design and development;

7.5 Enhance and expand eco- tourism business opportunities and resource education/awareness events that highlight the preservation and wise use of the county's natural resource base;

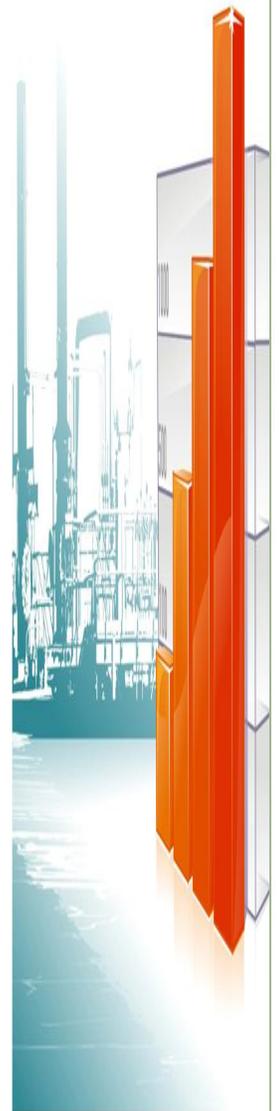
- a) Convene a nature based tourism partnership that focuses on the development of new heritage tourism, ecotourism and agritourism enterprises;
- b) Create a comprehensive public /private litter control and enforcement program modeled after successful initiatives in other areas;
- c) Engage corporate and business interests in making the fundamental connection between litter, environmental quality and economic development initiatives;
- d) Encourage urban adaptability for resource education programs such as 4-H and FFA to encourage integration into metropolitan school systems;

TECHNICAL REPORT 7: NATURAL RESOURCE VALUATION

This overview examines the different ways to make valuation of natural resources for tangible and intangible economic opportunities in Horry County. Information will be provided on different valuation techniques for tangible and intangible resources. Examples will be introduced using the techniques described.

There are several different ways to value natural resources; there are indirect techniques and direct techniques. Another classification used by environmental economists classify natural resources using two main categories they are; use values and non-use, or "passive use" values. Whereas use values are based on actual use of the environment, non-use values are values that are not associated with actual use, or even an option to use, an ecosystem or its services.

Use value, which is also similarly defined for direct techniques, is defined as the value derived from the actual use of a good or service, such as hunting, fishing, bird watching, or hiking. Use values may also include indirect uses. People may also receive indirect use values from an input that helps to produce something else that people use directly. For example, the lower organisms on the aquatic food chain provide indirect use values to recreational anglers who catch the fish that eat them. Non-use values, also referred to as "passive use" values, are values that are not associated with actual use, or even the option to use a good or service. Existence value is the non-use value that people place on simply knowing that something exists, even if they will never see it or use it. For example, a person might be willing to pay to protect the Alaskan wilderness area, even though he or she never expects or even wants to go there, but simply because he or she values the fact that it exists. It is clear that a single person may benefit in more than one way from the same ecosystem. Thus, total economic value is the sum of all the relevant use and non-use values for a good or service. (<http://www.ecosystemvaluation.org>)



Types of Valuation Methods

Travel Cost Method

The travel cost method is used to estimate economic use values associated with ecosystems or sites that are used for recreation.

The method can be used to estimate the economic benefits or costs resulting from:

- changes in access costs for a recreational site
- elimination of an existing recreational site
- addition of a new recreational site
- changes in environmental quality at a recreational site

The basic premise of the travel cost method is that the time and travel cost expenses that people incur to visit a site represent the “price” of access to the site. Thus, peoples’ willingness to pay to visit the site can be estimated based on the number of trips that they make at different travel costs. This is analogous to estimating peoples’ willingness to pay for a marketed good based on the quantity demanded at different prices.

Case # 1—Environmental Conservation

Situation

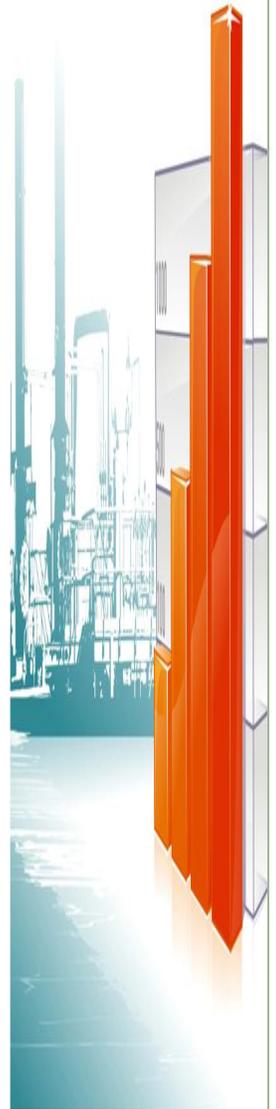
Hell Canyon on the Snake River separating Oregon and Idaho offers spectacular vistas and outdoor amenities to visitors from around the country and supports important fish and wildlife habitat. It also has economic potential as a site to develop hydropower. Generating hydropower there would require building a dam behind which would form a large lake. The dam and the resulting lake would significantly and permanently alter the ecological and aesthetic characteristics of Hell Canyon.

Challenge

During the 1970’s, there were major controversies regarding the future of Hell Canyon. Environmental economists from Resources For The Future in Washington, D.C. were asked to develop an economic analysis to justify preserving Hell Canyon in its natural state in the face of its obvious economic potential as a source of hydropower.

Analysis

Researchers estimated that the net economic value (cost savings) of producing hydropower at Hell Canyon was \$80,000 higher than at the "next best" site which was not environmentally sensitive. They then conducted a low-cost/low precision travel-cost survey to estimate the recreational value of Hell Canyon and concluded that it was about \$900,000. The researchers did not attempt to strongly defend the "scientific" credibility of the valuation method they used or the results. However, at public hearings, they emphasized that, even if the "true value" of recreation at Hell Canyon was ten times less than their estimate, it would still be greater than the \$80,000 economic payoff from generating power there as opposed to the other site. They also



illustrated that overall demand for outdoor recreation, for which the supply is limited, was going up, while many other sources of energy are available besides Hell Canyon hydropower.

Results

Based largely on the results of this non-market valuation study, Congress voted to prohibit further development of Hell Canyon.

Case # 2—Improvements in Water Quality

Situation

The costs to farmers and taxpayers of implementing on-farm best management practices to reduce sediment and nutrient runoff to the Chesapeake Bay are well known. Controversies arose during the 1980's, which continue today, over the benefits of resulting improvements in water quality.

Challenge

Economists were asked to assess the economic benefits of water quality improvements to beach users in the Chesapeake Bay area. They needed to establish linkages between differences in water quality and differences in willingness to pay for beach use. The hypothesis that to be tested was that average willingness to pay, as reflected in the travel costs to visitors to particular beaches, was positively correlated with water quality. If the hypothesis was correct the empirical results would allow researchers to estimate the increase in willingness to pay of improving water quality at all beaches.

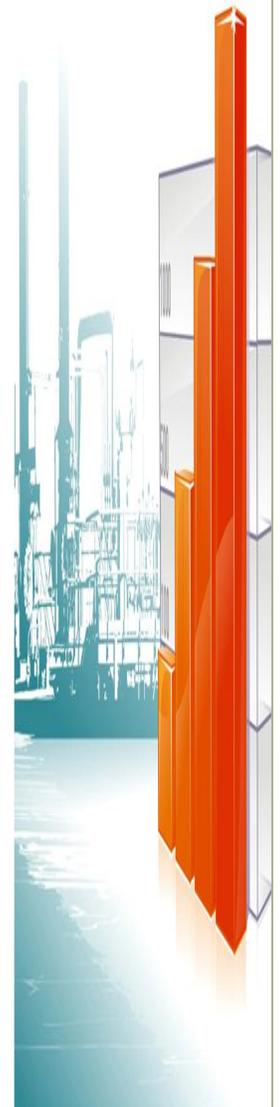
Analysis

Researchers selected the concentration of nitrogen and phosphorous in the water at the monitoring station nearest to the beach as an index of water quality at the beach. This was assumed to reflect the level of objectionable visual and other characteristics that affect the value of beach use. A cross-sectional analysis of travel cost data collected from 484 people at 11 public beaches was used to impute the aggregate willingness to pay for a 20% increase in water quality, which was assumed to be associated with a 20% reduction in total nitrogen and phosphorus.

Results

The average annual benefits to all Maryland beach users of the improvements in water quality were estimated to be \$35 million in 1984 dollars. These were thought to be conservative for several reasons, including:

- The value of improvements in water quality was only shown to increase the value of current beach use. However, improved water quality can also be expected to increase overall beach use.
- Estimates ignore visitors from outside the Baltimore-Washington statistical metropolitan sampling area.
- The population and incomes in origin zones near the Chesapeake Bay beach areas are increasing, which is likely to increase visitor-days and thus total willingness to pay.



Summary of the Travel Cost Method:

The travel cost method is used to estimate the value of recreational benefits produced by the environment. This method presumes that the value of the site or its recreational services is revealed in how much people are willing to pay. It is commonly referred to as a “revealed preference” method, because it uses actual behavior and choices to infer values.

The basic premise of the travel cost method is that the time and travel cost expenses that people incur to visit a site represent the “price” of access to the site. Thus, peoples’ willingness to pay to visit the site can be estimated based on the number of trips that people make at different travel costs. This is analogous to estimating peoples’ willingness to pay for a marketed good based on the quantity demanded at different prices.

The travel cost method is not a controversial method, mainly because it is modeled on typical economic procedures for measuring value, and it uses information on actual behavior rather than verbal responses to hypothetical scenarios. It is based on the simple and well-founded assumption that travel costs reflect recreational value. It is often relatively inexpensive to apply.

Information from the National Survey of Fishing, Hunting and Wildlife-Association for South Carolina revealed that in 2006 the total number of participants in wildlife recreation was 1.7 million. This method is the best to use if Horry County is looking into the valuation of tangible economic benefits.

Below is a table categorizing the activities of the participants.

Contingent Valuation Method

The contingent valuation method (CVM) like the travel cost method is utilized to estimate economic values for all varying environmental services. This method be used to estimate both use and non-use values, and it is the most widely used method for estimating non-use values. Please note however that (CVM) is also the most controversial of the non-market valuation methods.

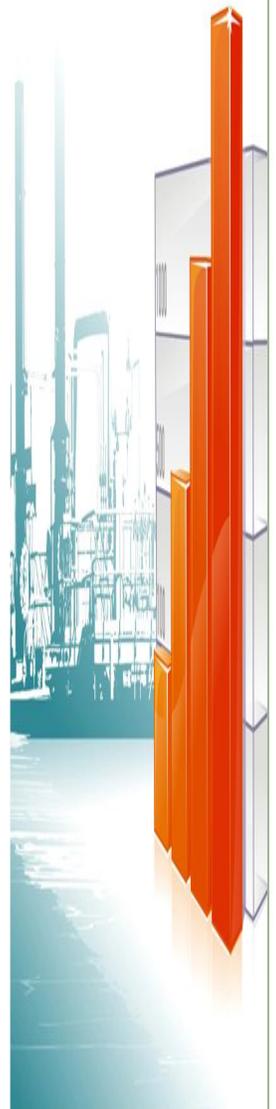
The contingent valuation method inquires from individuals, through surveys, how much they would be willing to pay for specific environmental services. This method is characterized as “contingent” valuation, because people are asked to state their willingness to pay, contingent on a specific hypothetical scenario and description of the environmental service.

The contingent valuation method is referred to as a “stated preference” approach, because the method asks persons to directly state their values, rather than inferring values from actual choices, as the “revealed preference” methods do.

The fact that CV is based on what people say they would do, as opposed to what people are observed to do is the source of its greatest strengths and its greatest weaknesses.

Example:

Using CVM, Sorg and others (1985) estimated that the gross value of a cold-water fishing trip in Idaho was \$80. This included \$37 per trip in expenditures (e.g., transportation, food, lodging,



tackle), plus \$43 per trip in consumer surplus (i.e., the amount the typical angler would be willing to pay over and above actual expenditures).

Contingent Choice Method

The contingent choice method is similar to contingent valuation, in that it can be used to estimate economic values for virtually any ecosystem or environmental service, and can be used to estimate non-use as well as use values. Like contingent valuation, it is a hypothetical method – it asks people to make choices based on a hypothetical scenario. However, it differs from contingent valuation because it does not directly ask people to state their values in dollars. Instead, values are inferred from the hypothetical choices or tradeoffs that people make.

Hedonic Pricing Method

The hedonic pricing method is used to estimate economic values for environmental services that directly affect market prices. It is most commonly applied to variations in housing prices that reflect the value of local environmental attributes.

It can be used to estimate economic benefits or costs associated with:

- environmental quality, including air pollution, water pollution, or noise
- environmental amenities, such as aesthetic views or proximity to recreational sites

Case Study of the Hedonic Pricing Method—Values of Environmental Amenities in Southold, Long Island

Situation

The town of Southold, Long Island, New York has coastlines on both the Peconic Bay and Long Island Sound. Compared to the rest of Long Island, it is a relatively rural area, with a large amount of farmland. However, population and housing density are rapidly increasing in the town, resulting in development pressures on farmland and other types of open space.

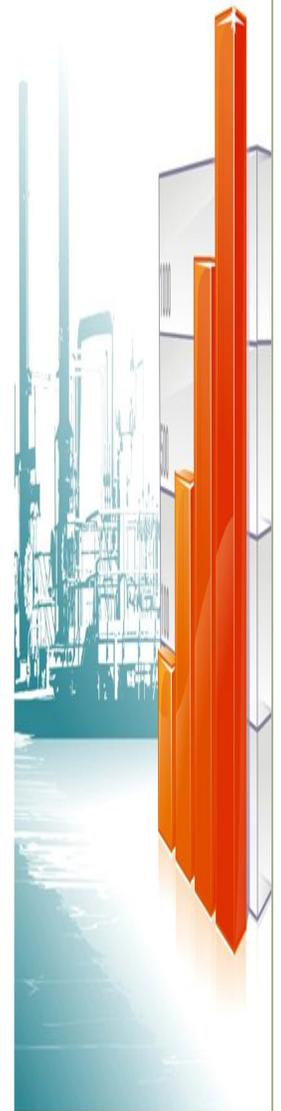
Challenge

The Peconic Estuary Program is considering various management actions for the Estuary and surrounding land areas. In order to assess some of the values that may result from these management actions, a hedonic valuation study was conducted, using 1996 housing transactions.

Analysis

The study found that the following variables that are relevant for local environmental management were had significant effects on property values in Southold:

- **Open Space:** Properties adjacent to open space had, on average, 12.8% higher per-acre value than similar properties located elsewhere.
- **Farmland:** Properties located adjacent to farmland had, on average, 13.3% lower per-acre value. Property values increased very slightly with greater distance from farmland.
- **Major Roads:** Properties located within 20 meters of a major road had, on average, 16.2% lower per-acre value.



- Zoning: Properties located within an area with two- or three-acre zoning had, on average, 16.7% higher per-acre value.
- Wetlands: For every percentage point increase in the percent of a parcel classified as a wetland, the average per-acre value increased by .3%.

Results

Based on the results of this study, managers could, for example, calculate the value of preserving a parcel of open space, by calculating the effects on property values adjacent to the parcel. For a hypothetical simple case, the value of preserving a 10 acre parcel of open space, surrounded by 15 “average” properties, was calculated as \$410,907.

Governments have long recognized the need to preserve certain open space lands because they are important providers of public goods and services such as food, fiber, recreation, and natural hazard mitigation, or because they possess rare geological or biological features.

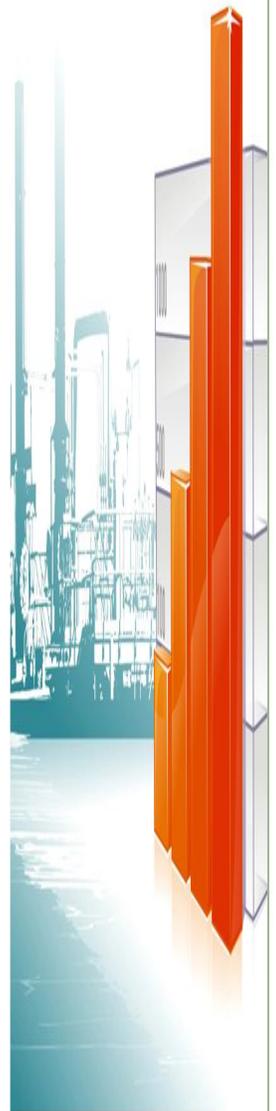
The most direct measure of the economic value of open space is its real estate market value—the cash price that an informed and willing buyer pays an informed and willing seller in an open and competitive market. Open space value of land must be separated from its development value. Revenues from hunting and fishing- license sales are a major source of funding for state wildlife agencies. Less direct but perhaps more important from an overall economic perspective are expenditures from open space-related activities such as hiking, hunting, fishing, bird watching, nature photography, snowmobiling, skiing, and mountain biking. Such expenditures include the purchase of equipment, travel costs, lodging and accommodations, guide services, meals, groceries, etc., as well as attendant service jobs. These expenditures also have income and job multiplier effects (see below), and often occurs in rural areas with limited economic activity.

Examples:

In Concord, Massachusetts, a suburban Boston community with a relatively high number of conservation easements (54 of 6000 properties), the effect of a conservation easement on market value ranged from a 5%–100% reduction in value (Closser 1994). {{ The Economic Value of Open Space: A Review and Synthesis }}

A study of five parks in Columbus, Ohio, found a 7%–23% increase in property value for properties that faced open space (Weicher and Zeibst 1973). Between 1965 and 1969, properties facing a park sold for \$1130 more than similar properties one block away. Moreover, properties backing onto a park sold for about the same, and those facing intensively used recreational facilities sold for about \$1150 less.

In 1974 study of land values surrounding 524-ha (1294-acre) Pennypack Park in northeast Philadelphia, Pennsylvania, found a statistically significant rise in land value with proximity to the park, when controlling for other factors (Hammer and others 1974). The park accounted for 33% of the land value at 12 m (40 ft), 9% at 305 m (1000 ft), and 4% at 762 m (2500 ft). The authors concluded that each hectare of parkland generated \$6425/ha in enhancement value.



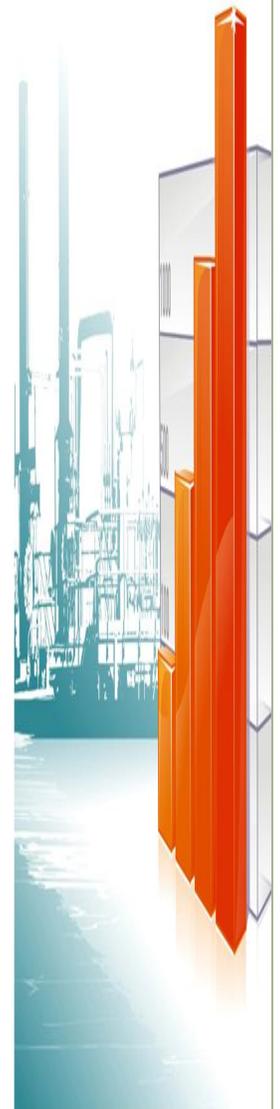
Correll and others (1978) found that in Boulder, Colorado, the existence of greenbelts (i.e., trails or stream corridors) had a significant impact on adjacent residential property values. While controlling for other variables, they found that properties adjacent to greenbelts in the three neighborhoods studied were worth an average of 32% more than those 975 walking-meters away (3200 ft). The relationship was linear: a \$13.75 decrease in the price of residential property for each meter away from the greenbelt (\$4.20/ft). In one of the neighborhoods the aggregate property value was approximately \$5.4 million greater than it would have been without the greenbelt, resulting in significant additional property tax revenues.

At least one study suggests that the effect of open space on neighborhood property values depends on how well the open space is integrated into the neighborhood (Correll and others 1978). Open space had a greater positive effect on property values in the neighborhood where it was purchased prior to house construction and included in the neighborhood design than it did where it was purchased after construction and separated from the neighborhood by a major limited access highway. The relationship between the market and enhancement values of open space depends upon land scarcity and the perceived risk of development. In rural areas where most land is open space and likely to remain so, both market and enhancement value will be low. However, in urban or urbanizing areas where open space is scarce or diminishing, market and enhancement value will be high.

Open space is often a significant provider of public goods such as scenic vistas, solitude, wildlife, and the neighborhood character. Economic values are typically estimated by determining the subjective value that people place on the resource or activities related to it. The subjective value people place on open space related recreational activities are also broken into the two broad categories aforementioned. Use value represents the value people place on a current use of the resource.

Three types of use value are recognized (Bishop 1987): (1) consumptive uses, such as hunting and fishing; (2) non-consumptive uses, such as hiking, camping, and wildlife photography; and (3) indirect uses, such as reading books or watching programs on open space-related resources or activities. In contrast to use value, nonuse values consider an individual's possibility for future use, or their altruism. Two broad types of nonuse value are recognized: option value and existence value (Weisbrod 1964, Krutilla 1967). Option value represents an individual's willingness to pay to maintain the option of utilizing a resource at some time in the future. Existence value represents an individual's willingness to pay to ensure that some resource exists. (The Economic Value of Open Space)

The best method for the valuation of natural resources for tangible economic opportunities and intangible valuation of natural resources has to be determined on a case-by-case basis. While there are several techniques one can explore these applications have their faults and fortitudes. In the case of evaluating tangible economic opportunities however the travel cost method is one of the more reliable easily calculated. In regards to open space several of the methods can be utilized depending if the space is going to be used or not. Overall it is a necessary to determine what the value of an area is to its constituents before any economic development takes place.



TOURISM

8.1 Collaborate with state and local tourism partners to market Grand Strand tourism opportunities to a diversity of tourism markets and demographics.

- a) Engage a diversity of regional tourism interests in the formation of a Grand Strand Tourism Alliance for the purpose of collaborative marketing, planning and product development;
- b) Convene a Tourism Leadership Council to serve as think-tank for strategic planning related to all components of the tourism industry;

8.2 Work with public and private sector tourism interests to promote the tourism industry;

- a) Work with state officials to market tourism as a significant component of a diversified economic development strategy; particularly in areas facing decline of traditional industry;
- b) Celebrate the tourism heritage of coastal communities by sponsoring a yearly tourism symposium hosted by the local collaborative interests;
- c) Seek public and private funding in support of collaborative initiatives;

8.3 Enhance tourism market sustainability, diversification, and expansion;

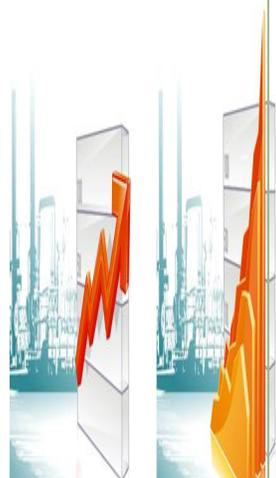
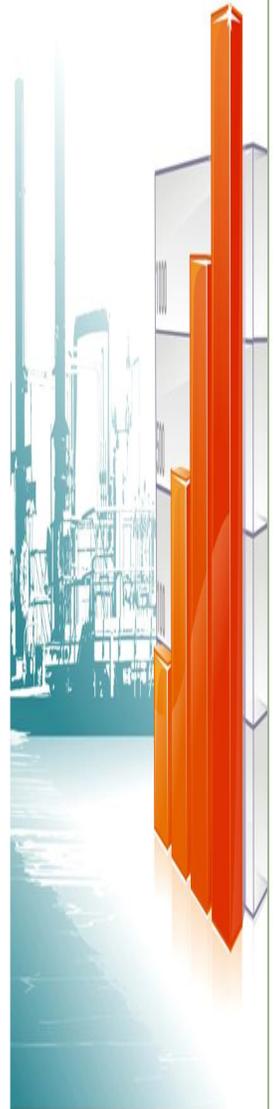
- a) Conduct a comprehensive demographics and market analysis for all tourism products and geographies that make up the region;
- b) Create a tourism master plan that focuses new product development, tourism market diversification, collaborative marketing, tourism asset sustainability, and tourism cluster expansion;
- c) Highlight unique features of community identity for all areas that make up Horry County as a distinct marketable feature of a diversified tourism strategy;
- d) Utilize student resources available through local resort tourism programs to conduct a regular survey / questionnaire program to inform product development;
- e) Seek the assistance of international tourism consultant to assess tourist product offering and target market to appropriate demographics based on assessment;
- f) Develop a countywide litter clean-up initiative for all local waterways and public lands in support of the development of new outdoor recreation and ecotourism opportunities;

8.4 Expand tourism season to target to cover the entire year with a diversity of tourism program and product offerings;

- a) Host regionally impacting activities such as road races, biathlon/triathlon events, golf tournaments, fishing tournaments and outdoor sporting events in the off-season;

8.5 Accommodate all convention related business travel through the expansion of current tourism infrastructure and development of new conference capacity;

- a) Seek the development of premier entertainment venue to host large capacity sports and entertainment opportunities;



- b) Conduct and economic impact study associated with the expansion and/or new development of convention center facilities;
- c) Develop a tourism preamble to win support of local leadership and policy makers for the purposes of prioritizing capital improvements to the tourism infrastructure;

TECHNICAL REPORT 8: TOURISM COLLABORATIONS

The following case study deals with different tourism alliances throughout the country. The reasons for collaboration are examined briefly, then examples are presented and samples of ways to develop a tourism partnership/alliance are explored.

The need for a tourism alliance is well acknowledged in the literature as well as by participants in the field. "Whether the tourism objective is economic development, conservation, social justice, or protected area management, we are discovering the power of collaborative action." Selin 1999. An assortment of societal forces is providing powerful motivations for tourism interests to create collective responses to industry challenges and opportunities. (Selin, 1993)

Overarching reasons for collaboration in the tourism arena is plentiful given the swift economic and technological changes that take place throughout the country and the world. Globalization and linked global interdependence, coupled with blurred boundaries between government, private sector, and other NGO's have generated a diverse array of collaborative responses to gain access to new technologies or spread the cost of marketing innovation over several parties. Palmer et al. list four main reasons for collaboration at the tourism level.

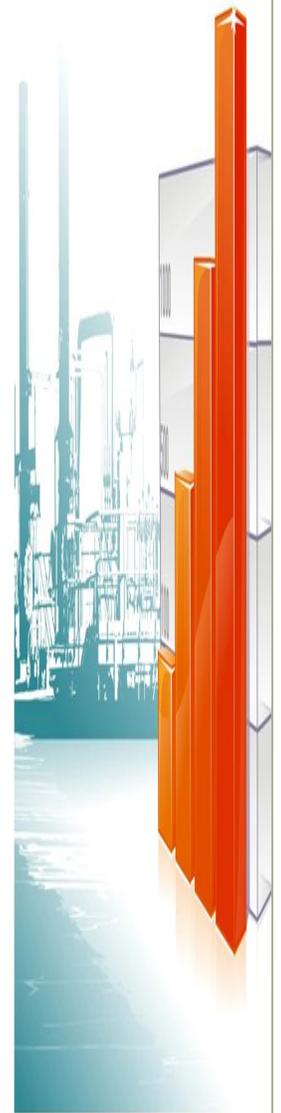
Reasons for collaboration (Palmer et al., 1995):

- The ability to create greater levels of awareness through pooled promotional campaigns to the destination.
- Recognizing the interdependencies of the public and private sectors with regards to tourism.
- Following examples from other industries to benefit from economies of scale.
- Faced with functional specialization and scarcity of resources.

Once business or areas have determined that they are willing to collaborate for the shared economic advantages, they are well advised to follow the critical characteristics to the collaborative process, while noting Collins and Doorley's four features of alliances which are: joint dependency, collaboration, an impact on competitive position and longevity of the relationship.

Critical characteristics to the collaborative process:

- Stakeholders are interdependent
- Solutions emerge by dealing constructively with differences
- Joint ownership of decision is involved
- Stakeholders assume collective responsibility for the future direction of domain
- Collaboration is an emergent process



Two seemingly successful tourism alliances are presented, providing examples of things they have accomplished and giving an overview of their partnerships/alliances. All of this information was obtained directly from the various alliances.

Tourism Development Alliance of Georgia (TDAG)

The Alliance was founded in 2002 to increase awareness of the tourism industry as a strategic economic development engine within Georgia's economy. Over the past three years, the Alliance has been successful in reaching its initial goals. The Alliance was founded to increase awareness of the importance of tourism to the state of Georgia's economy. The Alliance strives to create support for tourism by collaborating with tourism industry businesses, as well as engaging with the business and economic development community, state agencies and elected officials. As an independent voice for effective tourism policy, the Alliance has the ability to partner with key membership organizations within Georgia related to business, economic development, government, and tourism. This ability to partner with organizations across the spectrum, uniquely positions the Alliance to act as a catalyst to generate support & understanding of the positive economic impact tourism provides for all the citizens of Georgia. TDAG receives no public funds and is sustained by the generous support of its sponsors, partners and members. TDAG membership is open to any individual or organization with an interest in developing tourism in Georgia. Included in this group are: accommodations, airlines, attractions, campgrounds, convention and visitor bureaus, chambers of commerce, publications, public relations and advertising firms, regional groups, restaurants, suppliers to the tourism and convention community, and more.

For the upcoming year, the Alliance's Program of Work will focus on Agenda for Action (Legislative, Grassroots Advocacy, and Education) and strengthening the Alliance. This coordinated program will help maintain and redefine the momentum the Alliance and its partners have generated for tourism.

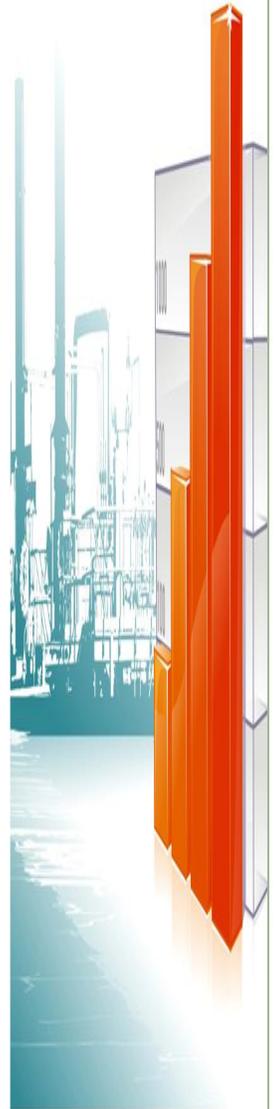
TDAG mission is to increase awareness of tourism and strengthen Georgia's economy through tourism development and promotion.

The Alliance will achieve this mission by:

- Facilitating partnerships between the various stakeholder organizations that benefit from tourist expenditures
- Educating elected officials, their constituents and business leaders to the importance of the economic opportunities created by tourism on a local & statewide basis
- Advocating tourism policy issues at the local, state & federal levels. The Alliance is not a traditional trade association. As an independent voice for Georgia tourism, the Alliance has the ability to partner with key membership organizations within Georgia related to business, government and tourism.

Benchmarks for Success:

- Increased tourism funding for GDEcD by \$3 million over 3 years
- Passed Hotel Tax Reform to further define tourism promotion and create accountability for local governments



- Creation of the Georgia Tourism Foundation
- Integration of tourism into existing incentive programs
- Official recognition of tourism as one of 6 strategic industries to grow Georgia's economy
- Creation of standing committees in the House and Senate on Economic Development
- Affiliation with the Georgia Chamber of Commerce
- 2006 National Recognition by the Southern Governors Association as a best practice in Tourism Advocacy and Education

Issues that the TDAG tackled:

Advocate for revision to Georgia Accommodations Tax Code

Background: Each county and municipality in Georgia can levy and collect an excise tax for the rental of guest rooms in hotels, motels, inns, tourist cabins and lodges. This tax was originally intended to create a revenue stream for local governments to invest in the ongoing promotion of tourism, conventions, and trade shows. There are 23 versions of the tax code, and it has become increasingly cumbersome. TDAG supports legislation to 1) grandfather existing tax structures; 2) provide 1 clean code section which provides some flexibility for local governments for tourism product development; 3) provide a sunset clause for bond projects; 4) provide enabling legislation which is authorized through local act of the Georgia General Assembly; 5) move the definitions to the front of the code section and 6) eliminate the extended stay exemption.

Increase funding, from \$5 million to \$15 Million, for the tourism division of the Georgia Department of Economic Development to advertise, market and promote Georgia as a tourist destination

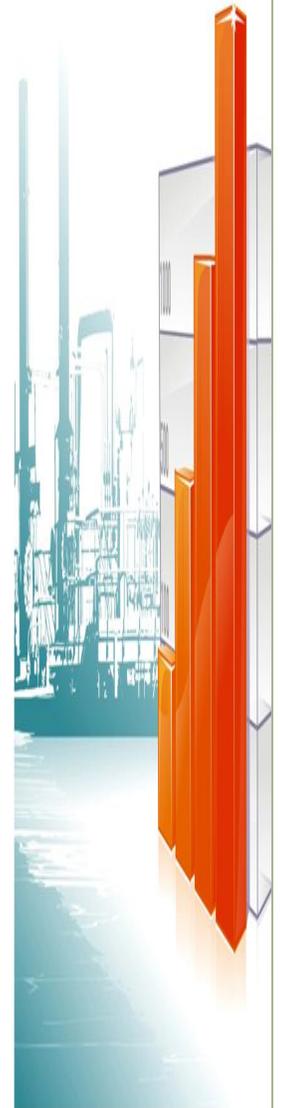
Background: Tourism is economic development. Thanks to the support of the General Assembly, the Tourism Division of the Georgia Department of Economic Development (GDEcD) has received incremental increases in funding for tourism advertising and promotion over the last 5 years. This acknowledgement of tourism's role as a viable economic development strategy for the state is a good first step, but our work is not complete.

Georgia has the 8th largest tourism economy in the country. Every state that directly competes with Georgia invests 25% to 100% more than Georgia. Based on the results of the 2006 study by Marketing Workshops, the multiplier for increased advertising investment is \$7.74 in additional state tax dollars for every dollar spent on advertising. An increase of \$10 million would generate \$75 Million in additional state tax revenue.

Develop a nationally recognized hospitality curriculum for Georgia's technical schools

Background: Georgia has been a national leader in programs designed to promote economic development in traditional industries such as manufacturing and distribution. Incentive programs like Quickstart, Research and Development and others have attracted thousands of jobs to our state. However, tourism, Georgia's second largest industry, has been excluded from these programs.

The private sector's capital investment in tourism is often in excess of \$130 million for one given project. One of the largest issues these investors face is qualified workforce candidates in the



region. The state needs to develop the necessary programs to allow Georgians to qualify for these jobs, and so that our business community will not have to import employees from other states.

Tourism businesses struggle every day with finding qualified employees. Georgia needs to develop industry-tested, research-driven hospitality training. There are a number of great programs around the state in our technical schools. The Tourism Alliance supports expanding these programs to other schools around the state to develop a nationally recognized hospitality curriculum. Additionally, the tourism industry supports a commensurate increase to DTAE's budget to insure the department has the resources necessary to accomplish its expanded mandate.

The Greater Charlotte Hospitality & Tourism Alliance (HTA)

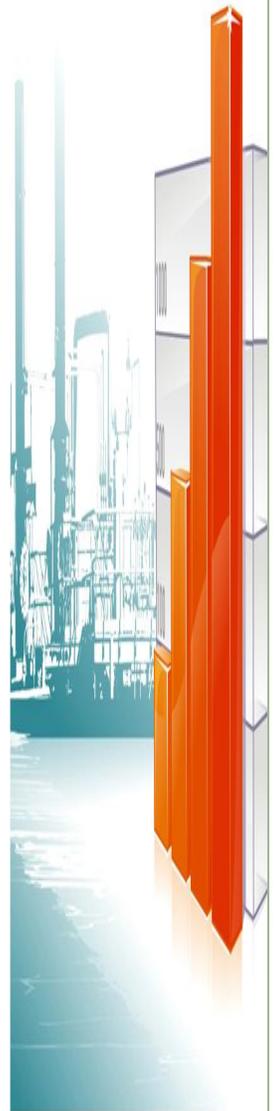
The Greater Charlotte Hospitality & Tourism Alliance (HTA) is a full time association representing more than 800 businesses in the greater Charlotte area. The leaders of different segments of the hospitality industry established the organization in October 1994. This combined organization was created to respond to the need for a full time and privately funded organization which was required to represent this growing industry with a commitment to proactively influence decisions, eliminating industry related challenges and maximizing opportunities for our remarkable industry.

The industry currently generates nearly \$3 billion in annual revenues and employs more than 60,000 people in Mecklenburg County. As a membership organization, our main objective is to accommodate various needs of our diverse membership. With that in mind, our primary focus is centered on efforts, which will increase the bottom lines of our members' businesses.

The Greater Charlotte Hospitality & Tourism Alliance (HTA) was established in October of 1994 by the leaders of different segments of the industry (hotels, restaurants, attractions, and allied businesses) as a full-time association, fully funded by its membership, with a mission to proactively promote, protect and serve the region's industry and the entire membership.

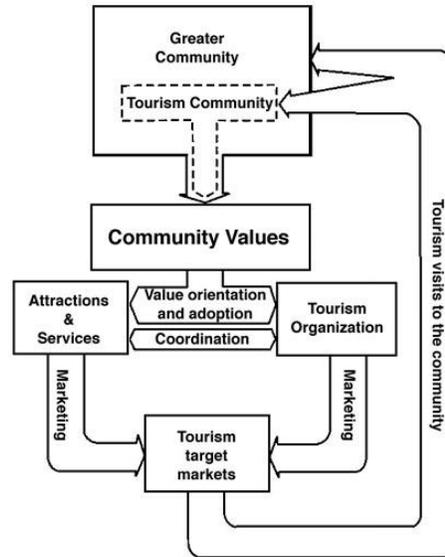
The following is a partial list of the HTA's accomplishments since its inception:

1. Twelfth year of successful operation as an association representing more than 800 businesses in the Charlotte area and being known as one of the most effective business organizations in the Carolinas.
2. Responsible for pioneering a pro-active leadership mentality for the local hospitality and tourism industry.
3. Establishing civic and political clout, as well as relationships for hospitality and tourism business through relentless representation for the industry, in order to create the awareness, respect and influence which was needed to empower us to lead the growth and development of our remarkable industry.
4. Responsible for initiating and leading efforts which resulted in creation of the Charlotte Regional Visitors Authority (CRVA).



5. Has relentlessly been initiating, leading or involved with efforts to pass local ordinances or state legislations which are pro-industry and business, while preventing ordinances and legislations which could have created unreasonable challenges and cost for hospitality related businesses or businesses in general.
6. Has proudly been leading initiatives which were required to create recognition and respect for hospitality related jobs, in order to effectively address industry related workforce development opportunities, challenges, recruitments and retention.
7. For the past decade, the HTA has been a major part of initiating, leading or actively participating in development of all major hospitality and tourism related projects, and initiatives, which have made our region a formidable visitor's destination. Projects include the Charlotte Convention Center, Westin Hotel, the new Bobcats arena, NASCAR Hall of Fame, Arts and Cultural facilities/Wachovia Project, etc.
8. Has proudly been a valuable resource and partner for other industry related, business, civic and charitable organizations and has participated in a large number of worthy projects aimed at making our community a better one for all deserving residents.

Integrating Community Values Into Rural Tourism Development



Community Tourism Planning and Development

Bi-national Tourism Alliance

BTA partners began collaborating informally on cross-border tourism initiatives in the Niagara region in the year 2000. This collaboration was driven by a combination of funding cuts affecting organizations on both sides of the border, as well as an awareness of the compatibility of products and services offered, and a shared customer base.

Partners involved in the early years agreed there was great benefit in working together to develop tourism products collaboratively and various successful initiatives were delivered in order to test the processes and prove the viability of the concept to partners and customers: Binational Tourism Guide/Map (2001, 2002, 2003), Binational Doors Open Niagara (launched in 2002), Binational Tourism Conferences (2002, 2003) and industry training sessions (2001, 2002, 2003).

These informal attempts proved to be both instructional and successful. In 2003, partners began discussing formalizing the initiative and after much research, and a due diligence process, agreed to incorporate the Binational Tourism Alliance. This was completed in April 2004 in New York State and in April 2005 in Ontario.

BTA operates under one joint volunteer board of Canadian and U.S. directors from private, not-for-profit and the public sectors, representing the major tourism products and services in the

cross-border regions: hotels, wineries, transportation, restaurants, cultural and heritage sites, gaming, festivals and events, media, academia, attractions, and the various marketing and governmental organizations involved in the tourism industry.

Tourism Planning:

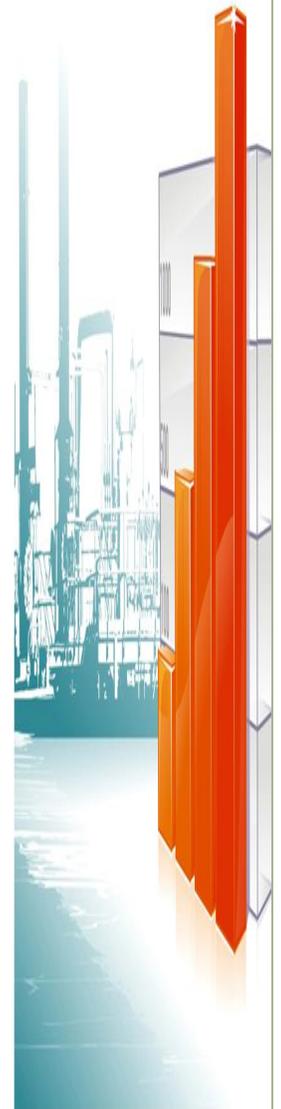
1. Define goals and objectives.
2. Identify the tourism system.
 - a) Resources
 - b) Organizations
 - c) Markets
3. Generate alternatives.
4. Evaluate alternatives.
5. Select and implement
6. Monitor and evaluate.

Comprehensive tourism planning requires a systematic approach, usually involving a series of steps. The process is best viewed as an iterative and on-going one, with each step subject to modification and refinement at any stage of the planning process.

MSU introduced six basic steps for Tourism Planning (*see left*)

<http://www.tourism.umn.edu/education/ctd/qa/c.html>

Overall the formation of a tourism alliance is found to be beneficial to all parties involved. It is not a novel concept and has been used by several communities not only throughout American but the world in general. The benefits that are accrued to the community far out weight the cost and a careful planning and implementation of the council where stakeholders are invited to participate will assure success.



TRANSPORTATION

9.1 Work with local, state and federal leaders to secure the development of direct interstate access to the communities of the Grand Strand.

- a) Place a reporting member on I-73 Committee formed by the MB Chamber;
- b) I-74 from I-95 to Carolina Bays North Extension;
- c) Actively seek dedicated funding for prioritization of I-73 segments from I-95 to the beach; make connection with SC 22.

9.2 Facilitate needed expansion and growth of Myrtle Beach International Airport

- a) Marketing through a partnership with the state, NESAs, MBREDC that reaches out to industry associations, public and private;
- b) Work with local business organizations to supply the empirical data in support of expanded air passenger and freight capacity at all local airport facilities ;

9.3 Facilitate the development of a comprehensive transit network in the form of light rail and buses.

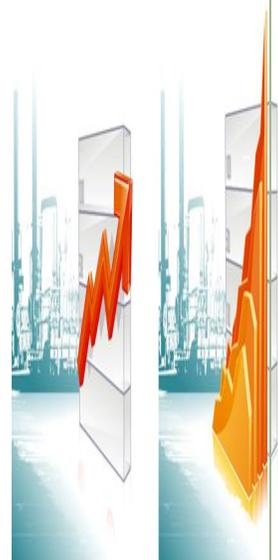
- a) Seek long –term dedicated funding for COAST RTA through Coastal Alliance; use funding to leverage additional federal/state transportation resources;
- b) Study feasibility of increased rail capacity for existing railroad infrastructure; Study the acquisition of additional railroad right-of-way property associated with new light rail, passenger and freight routes;

9.4 Ensure primary and secondary road interconnectivity between neighborhoods and communities (reduce the number of cul-de-sac communities).

- a) Consider interagency planning relative interconnectivity for neighborhoods;
- b) Convene a collaborative leadership council that integrates land use and transportation policy issues with existing planning tools and practices;
- c) Tap into Green-TEA resources to promote connections between neighborhood walkability and healthcare issues;
- d) Promote outreach initiatives focused on educating the development community about planning policies and growth strategies;
- e) Encourage the development of planning ordinance that require roadway connectivity in compliance with comprehensive planning objectives;

9.5 Acquire government incentives to increase mass transit, and energy efficient and economical transportation.

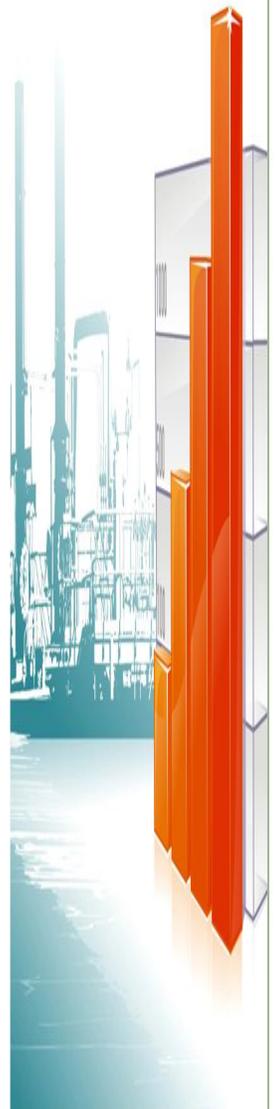
- a) Facilitate the development of alternative fuel infrastructure and fleet development for local, state and federal entities;
- b) Encourage the expansion of alternative fuel distribution capacity at strategic distribution nodes;



- c) Work with regional transit authority, educational institutions and municipalities to increase ridership through the development of comprehensive signage, wayfinding and marketing programs associated with transit operations;

9.6 Take proactive steps to mitigate traffic congestion along primary transportation corridors.

- a) Promote high density transportation measures along primary traffic corridors such as US 17 and US 501 (HOV lanes, etc.);
- b) Require the inclusion of design elements that eliminate traffic congestion along major transportation corridors when adjacent properties are developed (i.e. frontage road segments, limited access, curb-cut consolidation, parallel routes, etc.);
- c) Encourage frontage road build-out along US 501;
- d) Encourage the development of parallel routes to primary beach corridors such as Postal Way and International Drive;
- e) Pursue the development of the Southern Evacuation Life Line Route as a limited access parallel alternative to US 501;
- f) Encourage the application of flex time standards to limit congestive build-up along primary corridors;



IMPLEMENTATION

Throughout the course of the planning process it has become clear that in order to sustain the momentum generated by this initial collaboration and to achieve implementation of objectives contained therein, a culture of visionary leadership must be nurtured in both the public sector and business community. In some cases strengthening existing relationships and collaborations may satisfy such needs, however in others the formation new partnerships and associated organizations may more effectively catalyze the achievement of a collective economic vision.

Information on the limitation of previous planning initiatives should inform the implementation strategy associated with this project. Likewise, examples garnered from similar processes in other geographies are extremely helpful in terms of providing a model through which the most appropriate actions may be taken here. The following information concerns organizations established to deal with similar issues related to economic and community development. In some cases these groups were formed around collateral planning initiatives and in others planning was an objective of the group's formation.

Greenville Forward

Greenville Forward was created in January 2006 to help Greenville achieve its vision for 2025. By having a group like Greenville Forward, whose sole purpose is to facilitate, coordinate, and communicate the ideas from Vision 2025, the aggressive goals for Vision 2025 will be kept vibrant, alive, and reachable. While many of the ideas of the Vision would "just happen" even if Greenville Forward didn't exist, an organization focused on the Vision will help programs happen more quickly, logically, cheaper and with fewer duplications of efforts and energies.

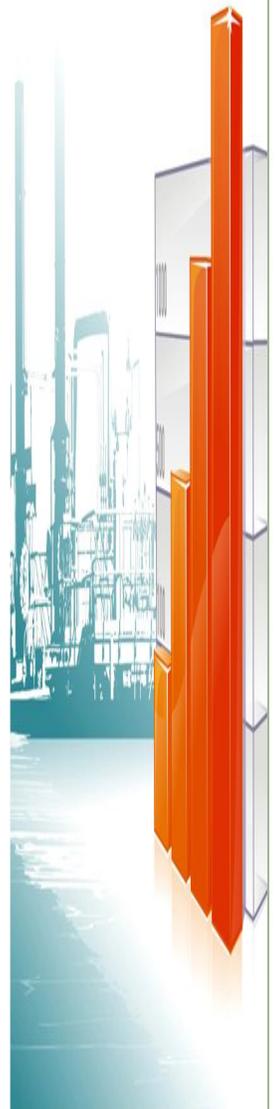
To make the Vision a reality, Greenville Forward focuses on the following program of work:

- Develop and share community report cards on the progress of "Vision 2025" goals;
- Be a primary contact and advocate for Vision 2025;
- Identify and develop young and emerging talent in Greenville and help them become more engaged and connected in Greenville's future;
- Help non-profit and community driven organizations meet strategic goals which support the vision by providing consulting, guidance and support; and
- As a community steward, support individual projects that help reach Vision 2025 initiatives

Greenville Forward is governed by a board of directors and maintains a fulltime executive director and part-time staff.

Florence County Progress

Florence County Progress, Inc., (Progress) the private sector arm of the Florence County (SC) Economic Development Partnership. Progress was created in the early 1980's by business leaders throughout the county to provide private sector support and leadership to our publicly funded economic development program. Progress' mission is clear... to promote, implement and support



activities designed to improve the economic development of Florence County and to maintain a quality climate for business and industry.

Progress is a not-for-profit corporation made up of more than 225 members, ranging from multi-national corporations to retired business executives. Progress' annual revenues exceed \$350,000, most of which are funneled to the Florence County Economic Development Partnership for program delivery. These programs include the Partnership's outreach marketing efforts, existing business and industry services and economic development ally relations. No Progress funds are utilized for Partnership overhead. Thanks to Progress, the Partnership enjoys the highest level of private sector funding per capita of any local economic development organization in South Carolina.

Committee of 100 – Huntsville, AL

The Huntsville Committee of 100 was formed in 1995 by a small group of small business leaders with a sincere interest in the progress of Huntsville. They wanted to form a business organization that was active in local political issues, primarily:

- Developing a broad long-term economic development strategy that addressed retail development, downtown development and high-quality public education
- Attracting and supporting qualified, progressive candidates for local political office and lobbying for local business issues

Since its formation the group has grown to include over 180 members who participate in a range of activities including but not limited to BlzPac (political action committee), business policy advocacy, leadership training, business seed capital, young-professional development, and a strategy think-tank.

The organization is governed by a board of directors with representation from individual program boards. A part-time executive director is employed by the group and is seen as an indispensable asset with regard to the organization of events and activities. Organizational programs are supported by a dues structure that allows considerable leeway for political advocacy.

Though the organization is composed of a diversity of small business owners, corporate executives, healthcare professionals, university leaders and other professionals, the consistent theme of progressive government serves as a foundation principle for all programmatic activity. All members are not required to participate in all programs. Group accomplishments include:

- Provided vision, leadership and funding to several economic development issues, including two BRACs, defense business recruitment, building generals' homes, retail development incentives and marketing, community visioning, downtown development, and attracting and retaining the young professional workforce. Worked four years to form and fund new downtown development organization, Big Spring Partners, in 2004. Partnered with the Chamber of Commerce and Arts Council to develop and implement the Huntsville Talent Magnet strategic plan to better attract and retain the young professional workforce.



- Provided vision, leadership and funding to several public education issues, including academic/leadership programs for high-risk youth, Huntsville City Schools Strategic Plan, property tax referendums supporting school systems in Huntsville and Madison County, New Century Technology High School, workforce development programs, and implementation of a marketing program in Huntsville City Schools.
- Development of a Political Training Institute in 1998, 2000, 2002, 2004 and 2006 to attract and train current and future progressive political candidates in conducting a successful political campaign.
- Sponsored quarterly meetings for members and other business and community leaders on strategic issues that impact economic development and public education.
- Formed a Business Advisory Council for the Superintendents of all three local school systems.
- Formed partnerships with other business and community groups to impact key economic development and public education issues.
- Provided a timely business view to and lobbied local elected leaders on emerging local issues.
- Funded candidates with a progressive vision and a cooperative spirit in 1996, 1998, 2000, 2002, 2004 and 2006 local elections.

Committee of 100 – Kershaw County, SC

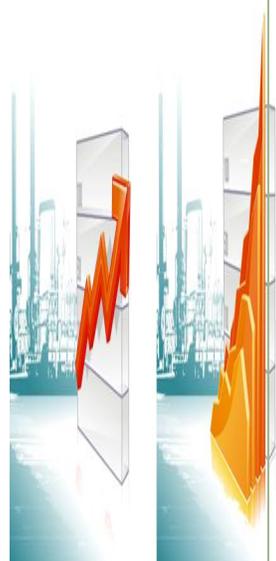
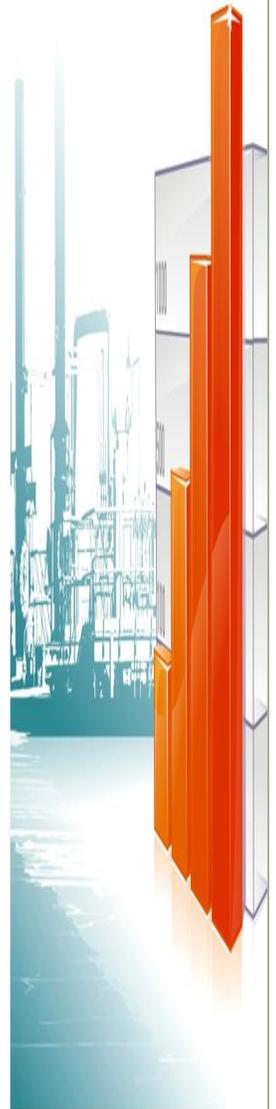
Since 1986, the Kershaw County Committee of 100 has supported economic development in the community by providing private sector resources to the Kershaw County Economic Development Office. The Committee of 100 is a non-profit organization whose purpose is to promote programs designed to encourage, enhance, and foster economic development in Kershaw County through the attraction of new industry and expansion of existing companies.

The Committee of 100 is a 501(c) (4) non-profit organization. A nine member board of directors, elected each year during the annual meeting governs the organization. Memberships are nontransferable and dues are \$125 a year. Membership year runs from July 1 to June 30.

The Committee of 100 financially supports many of the programs and events of the Kershaw County Economic Development Office. These activities include: printed marketing materials, web page development, promotional video production, newsletter publication and participation in recruiting trips. Other special events which the group sponsors include: company announcements, company groundbreakings, industry appreciation golf tournament & reception, and an annual meeting

Committee of 100 - East Polk County, FL

In 1996 representatives from (12) East Polk County communities worked to bring resources together in order to create a stronger alliance for addressing economic growth. The Central Florida Development Council (CFDC) offered support and assistance throughout the transition period and development of East Polk Committee of 100. The communities of Auburndale, Davenport, Dundee, Eagle Lake, Fort Meade, Frostproof, Haines City, Lake Alfred, Lake Hamilton, Lake Wales, Polk City, and Winter Haven formed and incorporated the East Polk Committee of



100, Inc. (EPC100), a consortium to address economic growth. The EPC100 selected their first Executive Director and immediately began building a solid membership of businessmen and women from the region. Articles of Incorporation were approved by the Department of State, and in 1996 the first Board of Directors was elected.

Close working, effective relationships were developed through the continued cooperation, coordination, and encouragement of the CFDC, Enterprise Florida, as well as other economic development organizations, and ongoing successes are realized.

East Polk County experienced the strongest residential and business growth rate of any region in Polk County during the last half of the 1990s, and the growth rate continues at an incredibly strong pace. Today, through the industrious effort and support of the EPC100's growing membership, a diversified slate of objectives that includes industry support, workforce development, and transportation are successfully being addressed.

Myregion.org – Brevard, Lake, Orange, Osceola, Polk, Seminole and Volusia, FL

Central Florida has all of the components necessary to be one of the world's greatest and most admired places. A beautiful environment, a thriving tourism industry, and a variety of technological offerings fill the community with countless opportunities to work, grow, play and explore. In order to provide a sound future for Central Floridians, realized the need to develop a collaborative plan to maximize regional resources based upon expanded research, collective goals and mutual understanding.

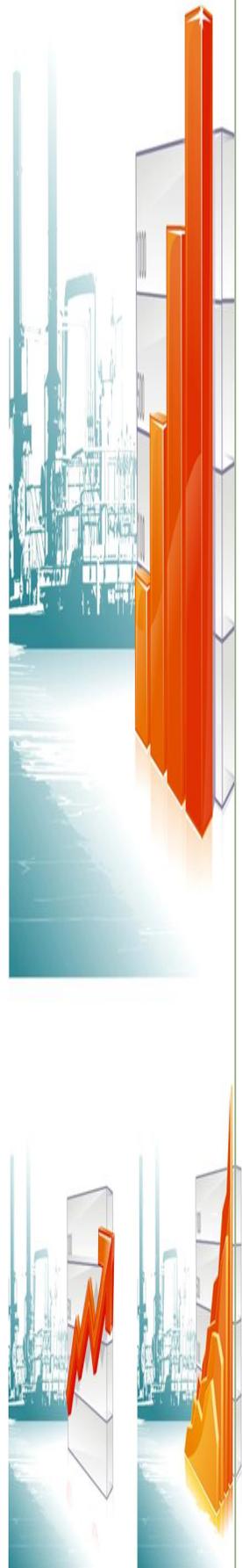
Led by a group of public, private and civic leaders, *myregion.org* encourages cooperation among community leaders to create a coordinated, comprehensive plan for Central Florida's future. Creating a collective vision for the region was seen as a means of securing Central Florida's place in the global economy and improving opportunities for future generations. *myregion* is governed by a board of directors from across the region - Brevard, Lake, Orange, Osceola, Polk, Seminole and Volusia Counties - and by the overall framework of goals, objectives, regional resolves, regional priorities and regional systems.

In support of this collaborative endeavor, Central Florida's public, private and civic leaders built a framework for the community's future. The framework seeks to establish a community that is globally competitive while offering an outstanding quality of life. To accomplish established goals the leadership of *myregion.org* supports Regional Resolves in the following ten priority areas.

Implementation Alternatives

As is the case with many of the initiatives above, the overall posture espoused by the strategies in this document is based on the fundamental understanding that economic development is dependent on collaboration. Public-private partnerships that go beyond the conventional

Regional Resolves
<i>Regional Leadership</i>
<i>Regional Corridor</i>
<i>Regional Transportation Organization</i>
<i>Regional Economic Development</i>
<i>Environmental Assets</i>
<i>Regional Concurrency Standards</i>
<i>Education Excellence</i>
<i>Regional Access</i>
<i>Public Safety</i>
<i>Regional Brand</i>



relationships maintained by the business and government organizations are essential to overcome the competitive environment. A number of alternatives exist for formation of an organizational mechanism whose specific purpose is sustain the collaborative momentum created through this planning process and monitor the progress towards the achievement of strategies therein.

Alternative 1:

A limited framework for collaborative economic development planning exists in the Taskforce convened to develop this plan. Monitoring the progress towards achievement of strategies that involve, private business organizations, civic groups, government entities, and non-profit organizations goes well beyond the group’s primary objectives and should involve many other elements of the community. In a formally organized capacity, the Strategic Plan Taskforce may serve the monitoring purpose.

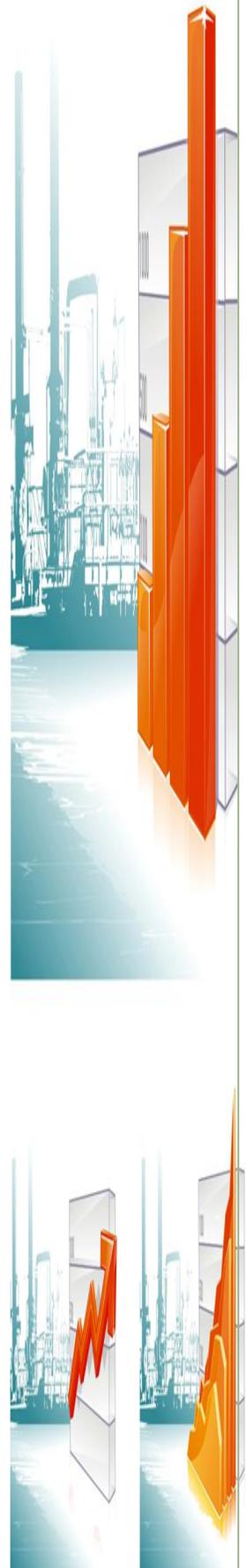
Extending the focus of the Strategic Plan Taskforce beyond planning stages to include monitoring and reporting of progress towards goals achievement, advocacy for specific strategies of the plan, and the pursuit of resources to sustain its projects and programs will undoubtedly require the assistance of, at a minimum, part-time staff. Resources from all strategic partners including government and business organizations will be required to maintain staff and group activities.

Alternative 2:

Many collaborative organizations including the Waccamaw Regional Council of Governments, the League of Cities, the Coastal Alliance, and Chambers of Commerce maintain economic development program and planning functions in Horry County. An existing entity such as the ones listed above may be the best vehicle to house the group associated with implementation of this plan. As opposed to developing a formal group structure from the ground up, the duties associated with implementation may maybe maintained in a subcommittee format.

In some cases the jurisdictional constraints that exist with respect to the focus of program activity in the above mentioned groups will require that the group itself become more inclusive of entities and areas not previously included. For instance, if the Strategic Plan were to become a program hosted by the League of Cities, then group membership would have to be expanded to include Horry County Representation. Likewise the Coastal Alliances current makeup includes primarily coastal jurisdictions and would require expansion to include inland areas that are included in this plan.

As with Alternative 1, this option will require a staff function that is not currently maintained by the above mentioned organizations. Accordingly existing staff responsibilities will have to be expanded to include the Strategic Plan program or new staff will have to be hired by the organization. Under either circumstance additional resources will be required from strategic partners including government organizations to maintain this new staff function. The limitation of autonomy under this alternative may not be seen as preferable when it comes to program focus and expenditure of resources.



Alternative 3

As indicated above, many similar planning efforts have resulted in the formation of new groups to oversee the implementation and monitoring phases. In some cases the autonomy of such an independent group was seen as desirable with respect to the types of activity the groups wished to conduct. In other cases no existing group format was in place to house the program that was envisioned.

The purpose of these volunteer organizations is largely focused on the achievement of both a physical, social and regulatory environment necessary to meet the community's need for business growth and sustainability. In some cases these groups pursue distinct activities that are not covered by other economic development organizations. In other case the groups in supplement efforts maintained by local government and business organizations. In all cases, the focus is on mitigating the competitive environment rather than complicating it by supplanting existing organizations.

Implementation Steps	
1.	Build public and private support for economic development efforts outlined in the plan
2.	Proactively seek participation of key partners in collaborative efforts, programs and projects
3.	Facilitate the achievement of priority strategies highlighted in the implementation matrix
4.	Attain financial resources necessary to sustain economic planning efforts on a continual basis
5.	Monitor and report on the progress of strategy/goals achievement to local business and government leadership
6.	Establish a framework and process for regular review and revision of economic development strategies
7.	Engage civic and community organizations as implementation partners

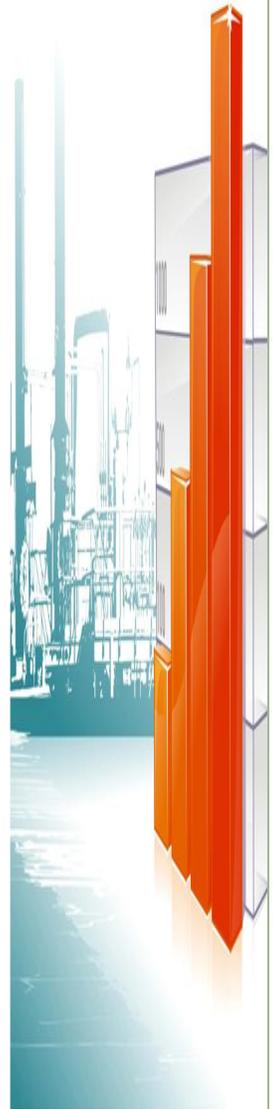
In order to overcome the programmatic and resource constraints that exist with other alternatives, it may be advantageous to form a new entity whose purpose is molded around that of the Strategic Plan and whose representation includes all public and private entities with a stake in the achievement of planned strategies.

The non-profit, dues based nature of such organizations provides some of the resources required to maintain necessary staff functions and creates the opportunity for pursuit of other funding mechanisms not available to primary government entities. Likewise non-profit status allows the group to pursue both government and foundation grant resources that are not available to private entities.

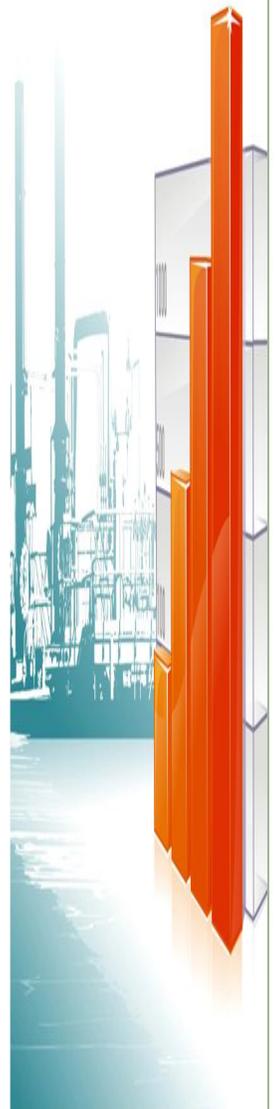
Conclusions

The organizational framework created to sustain this initial economic development planning effort will determine whether the strategies contained therein are achieved in the realization of a

cohesive economic vision. Without such structural support the effort is subject to the limiting factors that have made previous efforts only marginally successful. Each alternative provides a model for such structure. Regardless of which option is pursued, the role of the group in the implementation phase should include but are not limited to the activities listed in the table above..



Engaging local public institutions such as Coastal Carolina University and Horry Georgetown Technical College as well as statewide institutions such as Clemson in the initial phases of implementation may be helpful in the absence of established financial resources and organizational structure. These entities alone cannot however maintain long-term momentum required for the achievement of many included strategies. Instead each institution should be a partner with leaders of the business community, local government organizations, civic organizations and community service -entities once a sustainable organization framework has been established.



IMPLEMENTATION MATRIX

<i>The Economic Development Strategic Plan for Horry County</i>	Strategy Type	Implementation Lead		Implementation Timing		
		Public	Private/NP	1-5 yrs.	5- 10 yrs	10-20 yrs.
<p>Economic Development Vision A balanced and healthy economy through improved education, economic diversity, infrastructure, and natural resources.</p> <p>Economic Development Mission Horry County offers an enviable quality of life, deep cultural roots, distinct natural resources, and a history that fosters a special sense of place. Horry County will build on these assets to assure a balanced and healthy economic environment through enhanced educational opportunities, economic diversity, infrastructure development, and the preservation of our natural resources.</p> <p>Strategy Categories (A)Organizational Development, (B) Product Development, (C) Market Development, (D) Business Development, (E) Workforce Development</p>						
Business & Entrepreneurship						
<p>1.1 Develop a public campaign that highlights the importance of a diversified economy;</p> <p>a) Showcase local entrepreneurs to visitors;</p> <p>b) Refine County’s economic marketing messages to be consistent with the county’s targeted industries and industry clusters;</p>	C	ED,	CC, BO			
	C	ED	CC			
<p>1.2 Market Horry County as a place to start and expand a high value business;</p> <p>a) Form a work-group subcommittee that will develop a plan for building and supporting entrepreneurship in the county and region;</p> <p>b) Further develop business retention and expansion programs;</p>	A	ED	CC, BO			
	D	ED	CC			
<p>1.3 Foster entrepreneurial networks;</p> <p>a) Establish a forum for entrepreneurs to network with each other and use this and other means to raise awareness in the community about small business resources available to prospective and small business owners;</p> <p>b) Support Horry Industrial Alliance efforts to meet the needs of existing industries;</p>	A	ED	CC, BO			
	D	ED, SG	CC			
1.4 Establish a culture of entrepreneurship and strengthen						

infrastructure in support of small business and entrepreneurs; a) Support the development of entrepreneurial education curriculum in Horry County Schools, and higher education institutions;	B	ED, CCU, HG, SS	CC			
	B	CCU, HG	CC,			
	B	CG, ED, U				
	B	ED, SG	CC, BO			
1.5 Develop a research based approach to identifying and strengthening target business sectors for recruitment, retention, expansion, and growth a) Update target industry study that identifies market opportunities for new business recruitment and expansion;	B	ED, CCU				
b) Actively recruit target companies to the County	C	ED				
Collaboration						
2.1 Work to improve relationships between all levels of government a) Use an existing forum (e.g. Horry County League of Cities, Coastal Alliance) to bring together all units of local government on a regularly scheduled basis to discuss planning, issues and strategies;	A	MG, CG,				
b) Convene a regional economic council to discuss long term strategies related to regional and collaborative economic development initiatives;	A	MG, CG, SG				
2.2 Identify and quantify the benefits and cost of various levels of collaboration a) Conduct a categorized assessment of the cost and benefits of various levels of collaboration with respect to the provision and acquisition of public goods and services;	A	MG, CG, SG				

2.3 Develop strategies to build coalitions for reform of land use laws and protection of the environment; a) Convene topic based roundtable discussions between peer departments of local governments and public service entities (i.e. planning roundtable, public safety roundtable, recreation roundtable, etc.); b) Conduct an objective assessment of potential positive and negative attributes associated with consolidation of land planning activities;	A	MG, CG					
	B	CG, MG, CCU,					
2.4 Provide more consolidated and streamlined regulations and practices representing the various citizen interests; a) Identify opportunities for consolidated incentive, licensing and permitting programs applicable to projects with significant economic impact; b) Establish a forum through which citizens and professionals working in the development sector may remain current on the application of various planning tools in communities that make up the region (i.e. planning leadership programs, land use academy, etc.); c) Support the development of new business and industry partnerships that enhance the economic development environment in Horry County; d) Develop a regional land planning matrix that identifies consistency between land planning policies and differentiates the geographic application of regulations;	B	MG, CG	DC				
	A	MG, CG, SG	DC				
	A	ED, SG					
	B	MG, CG, SG					
Cultural Assets							
3.1 Identify and organize information on local cultural resources and opportunities a) Support Horry County Arts and Cultural Enhancement (ACE) in the organization, management and funding of cultural assets. b) Locate and secure a facility for operational support. c) Provide for future expansion of facilities to include strategically located satellite kiosks and information	A, C	MG, CG, ED	CC				
	B		NP, CO				
	B		NP				

stations. d) Create the funding necessary for program facilities and required staff.	B		NP			
3.2 Encourage and nurture growth and diversity of public and private cultural assets						
a) Promote the value of partnerships and collaborations among arts organizations and their communities;	A		NP			
b) Support city, county and state community efforts to utilize arts to attract and grow business	A	MG, CG	BO			
c) Promote cultural tourism as a core strategy for economic development;	A,B		CC			
d) Partner with area chambers and business organizations to promote tourism as an arts destination;	A		CC, BO			
e) Create an artist's incubator and associated cooperative organizational structure;	B		NP, CC, BO			
f) Identify public and private funds for incubator facility acquisition where artists have private, below market rate studios and shared common exhibition spaces;	B, C		NP			
g) Offer business training programs to creative artisans with interest in sustaining both virtual and actual studio space;	C	SG	NP, CC			
3.3 Facilitate the development of expanded eco-tourism and outdoor recreation business opportunities in both coastal and inland areas of the county;						
a) Develop an eco-tourism marketing campaign that targets specific markets and demographics;	B, C, D	SG	CC, BO			
b) Work with state and local tourism entities to develop and implement the campaign;	B	SG, ED	CC, BO			
c) Maintain eco-tourism niche small business training programs in support of new entrepreneurial enterprise development;	D	SG	CC			
d) Work with local and state tourism entities and higher education institutions to complete an eco-tourism product development concept including: access, infrastructure, business expansion, new business opportunities, and a resource inventory	B	CCU, SG	CC			

3.4 Enhance K-12-curriculum centered on local/state/regional cultural significance; a) Work with Horry County Schools to ensure continued support for arts programs as part of the overall curriculum; b) Establish a business and arts partnerships that showcases art created in schools in both public and private business settings; c) Create an arts mentoring program that transitions student artisans with identified skills into developmental training programs or workforce opportunities that nurture creative skills; d) Sponsor an arts education scholarship that makes additional training possible for local students that wish to develop their creative skills into a career; e) Create incentives for teachers to participate in Arts in Education programs;	A	SS	NP, BO			
	A	SS	NP, BO			
	B	SS	NP, BO			
	B	SS	NP, BO			
	B	SS	NP, BO			
	B	SS	NP, BO			
Education						
4.1 Ensure that every community recognizes the value of education and the need for all public and private schools to prepare students to be competitive in the rapidly changing world of the 21st century. a) Create organized forums through which greater parent teacher communication may be fostered; b) Utilize resources available through local faith-based and community organizations to sponsor parent/teacher engagement activities and programs; c) Work with the local and statewide industry organizations to market opportunities in the manufacturing sector to students, parents, and teachers; d) Collaborate with local Chamber of Commerce, business and industry organizations to host an annual job fair focused on workforce opportunities in career clusters identified by the Education and Economic Development Act (EEDA); e) Engage local utility providers and community	A	SS				
	A, B	SS	NP			
	B, C	SS, ED, SG				
	A, B	SS, HG	CC			
	A, B	SS, U	BO			
	A, B	SS, U	BO			

business leaders in the support of a Business and Education Partnership that supports an emphasis on math, science and technology curriculum and creates greater awareness of affiliated career clusters;						
4.2 Ensure that students are work and college ready, prepared for literacy in a digital age, prepared to be critical thinkers and are prepared to be effective communicators.						
a) Conduct an educational needs assessment and gap analysis of local employers;	B	ED, SS	BO			
b) Conduct staff development programs that make connections between 21 st Century skills, workforce demands, and curriculum attributes;	E	SS, ED, HG				
c) Evaluate existing curriculum for consistency with current and future workforce needs and modify accordingly;	E	SS, ED, HG	BO			
d) Partner with local higher education institutions to maintain and expand early college high-school and scholars academy programs;	D, E	SS, CCU, HG				
e) Work with the Academy for Arts, Science, and Technology and the Academy for Academics and Technology to offer innovative science, math and technology based curriculum and certifications that meet the needs of regional employers;	E	SS, HG	BO			
f) Develop dual enrollment opportunities at local higher education institutions in support of both the K-16 education model and employer demands in the workforce;	D, E	SS, CCU, HG				
g) Sustain continuing education opportunities that inform career counselors about opportunities associated with all career clusters identified by EEDA;	E	SS, HG				
h) Make GED programs accessible to all participants through the development of education and employers partnership programs;	A	SS				
i) Form a Higher Education Partnership that formalizes existing relationships between Horry County Schools and local institutions;	A	SS, CCU, HG				
4.3 Work with economic development entities and business						

<p>organizations to market the achievements of programs in Horry County's public and private schools and make the fundamental connection between education and economic prosperity;</p> <p>a) Develop a marketing campaign for premier achievements and unique program opportunities in public and private school systems;</p> <p>b) Maintain benchmark achievement data that may be utilized by economic development entities to highlight the quality of local schools systems</p> <p>c) Work with local and regional economic development organizations to articulate the importance of education to workforce and entrepreneurial development; produce digital marketing materials that may be used in economic recruitment activities;</p> <p>d) Work with through higher education partnership to highlight K-14 comprehensive educational opportunities in the County;</p> <p>e) Market opportunities and achievements in special needs and other niche education program available through public and private school systems;</p> <p>f) Produce a categorized education opportunities piece that identifies all program offerings in primary, secondary, adult education, continuing education, and alternative education sectors;</p>	B, C	SS, CCU, HG, ED			
	B, C	SS, CCU, HG, ED			
	A, B	SS, ED, HG			
	A	SS, CCU, HG			
	C	SS, CCU, HG	HE		
	B	SS, CCU, HG			
Healthcare					
<p>5.1 Form a healthcare consortium that focuses on community wellness and prevention, decreases health disparities, improves access and increase availability of specialty care.</p> <p>a) Conduct a community needs assessment to identify consistent healthcare indicators that may be used to address needs through collaborative outreach;</p> <p>b) Develop collaborative outreach programs focused on mitigating issues identified in the community needs assessment;</p>	B	HE	NP		
	A, B	HE	NP		
5.2 Partner with educational institutions to expand the					

<p>variety of health careers and educational programs currently offered.</p> <p>a) Work with local higher education institutions to create and promote additional healthcare training programs to meet the needs of the growing healthcare sector;</p> <p>b) Establish a partnership among local hospital systems, CCU, HGTC and SC Hospital Association that identifies training program needs and opportunities;</p> <p>c) Explore the utilization of cutting-edge medical technology and practices such as telemedicine and virtual surgery; develop training programs in support of such initiatives;</p> <p>d) Conduct a needs assessment of educational program offerings at all local institutions and develop programs to fill training gaps;</p>	A, B	HE, CCU, HG			
	A	HE, CCU, HG			
	B	SS, HE, HG			
	B	SS, CCU, HG			
<p>5.3 Create a resource guide for the general public and healthcare providers outlining all available healthcare resources in the county.</p> <p>a) Establish a coalition of all healthcare service providers including the United Way and the American Red Cross that provides printed healthcare resource guide in local libraries, post offices and online;</p> <p>b) Work with a coalition of healthcare service providers to develop a web-based community healthcare portal that serves as a singular resource for all healthcare related information in the county;</p>	A	HE	NP, CO		
	B	HE	NP		
<p>5.4 Establish a plan to increase fiscal support through local/state legislature, public and private sector foundations and grants to increase capacity to serve underinsured;</p> <p>a) Work through a local healthcare coalition to seek network funding in support of identified needs;</p> <p>b) Work with the SC Hospital Association to educate local and state policy makers about community healthcare needs and plan for the equitable application of funding resources in response to such needs;</p>	A,B	HE	NP		
	A	HE	NP		

<p>5.5 Increase healthcare industry capacity in Horry County to meet growing demand and create quality jobs.</p> <p>a) Conduct a study that establishes an empirical connection between residential and commercial growth and the expansion of the healthcare sector locally; use study to support the creation of new jobs and service opportunities in the healthcare sector;</p>	B	HE, CCU	DC			
Infrastructure						
<p>6.1 Develop sufficient revenue resources to enable public infrastructure to be used as a competitive advantage with respect to economic development;</p> <p>a) Study the development and application of an alternative equitable tax structure to accommodate targeted growth;</p> <p>b) Encourage the development of a written financial plan for the construction and maintenance of county infrastructure;</p> <p>c) Build political support for capital investment in the proposed airport and marine industrial parks and other infrastructure dependent economic development initiatives;</p> <p>d) Make targeted infrastructure investments in areas identified for business growth;</p>	A	CG, CCU	DC			
<p>6.2 Maintain state of the art communication technologies and encourage leading-edge communication technologies;</p> <p>a) Work with technology service providers to identify community best practices related to the provision of cutting edge communication technology infrastructure;</p> <p>b) Target new industry recruitment and entrepreneurial start-ups with consistent communications technology needs</p> <p>c) Build a model technology district with associated communications technology in strategic areas of the county;</p>	B	ED, U	CC, BO			
<p>6.3 Expand public safety services county-wide (fire, police, EMS);</p>						

<p>a) Support the expansion of police, fire, and emergency medical services staffing and pay levels in order to maintain a highly qualified professional personnel;</p> <p>b) Determine best practices associated with the provision of county-wide public safety services and index current levels of service with desired level of service;</p>	<p>B</p> <p>B</p>	<p>CG, MG</p> <p>CG</p>		<p>[Red]</p> <p>[Red]</p>	<p>[Red]</p> <p>[Red]</p>	
<p>6.4 Protect natural water resources through high levels of waste water treatment and stormwater control and maintain sufficient water supply for public consumption and fire protection;</p> <p>a) Determine water resource needs necessary to accommodate expanded residential, commercial and industrial capacity and growth;</p>	<p>B</p>	<p>CG, U</p>	<p>NP, DC</p>	<p>[Red]</p>	<p>[Red]</p>	<p>[Red]</p>
<p>6.5 Encourage the generation and utilization of environmentally sensitive, cost-effective electrical power and alternative domestic fuel sources;</p> <p>a) Study the utility infrastructure needs for target industry models and provide necessary transmission systems;</p> <p>b) Utilize alternative fuel source transmission systems as marketable asset when recruiting industry to specific sites;</p> <p>c) Study the design of a lead certified smart park that meets the specific infrastructure needs of target industries;</p> <p>d) Engage state research institutions in order to pilot innovative alternative fuels source and transmission programs at industrial park facilities;</p> <p>e) Utilize relationships with research institutions to market industrial park locations as industry/research cluster opportunities;</p>	<p>C</p> <p>C</p> <p>B, D</p> <p>A, D</p> <p>A, C</p>	<p>ED, U</p> <p>ED, CG, SG</p> <p>ED,</p> <p>ED, CG, SG</p> <p>ED, SG</p>	<p>NP</p> <p>BO</p>	<p>[Red]</p> <p>[Red]</p> <p>[Red]</p> <p>[Red]</p> <p>[Red]</p>	<p>[Red]</p> <p>[Red]</p> <p>[Red]</p> <p>[Red]</p> <p>[Red]</p>	<p>[Red]</p> <p>[Red]</p> <p>[Red]</p> <p>[Red]</p> <p>[Red]</p>
<p>6.6 Coordinate and facilitate the development of workforce housing to help attract new industries and larger scale businesses;</p> <p>a) Facilitate the location and development of workforce housing in close proximity to new industrial and</p>	<p>B, E</p>	<p>CG, MG</p>	<p>DC</p>	<p>[Red]</p>	<p>[Red]</p>	<p>[Red]</p>

business sites;						
b) Encourage the location of new workforce housing developments with the development community and local planning offices;	B, E	CG, MG	DC			
c) Coordinate workforce housing locations with public transportation services to minimize the impact of additional daily home to work trips.	B, E	CG, MG	DC			
Natural Resources						
7.1 Acquire ecologically sensitive and regionally important lands with significant natural resources and ecosystems for the protection of human and ecological benefits and services;						
a) Develop a county-wide land acquisition program based on prioritized/categorized tracts identified through the local open space programs;	B	CG, SG	NP			
b) Work with local government entities and planning authorities to develop a multi-tiered open space linkage program that accounts for open space networks in all jurisdictions;	B	CG, MG	NP			
c) Create a management plan associated with public properties identified for acquisition through open space planning efforts;	B	CG, MG	NP			
7.2 Maintain and ample supply of clean drinking water for use by the people of Horry County while improving water quality of all surface waters and ground water sources;						
a) Conduct a water resources study that assesses capacity and quality of all ground and surface water bodies, watershed resources and navigable waterways;	B	SG, CCU	NP			
b) Engage a consortium of water based business and institutional interests to sustain a water quality education program that seeks to mitigate impaired conditions in local water bodies;	A, B	CCH, HG	NP, CO			
c) Develop a comprehensive water quality monitoring network for point and non point source pollutants in impaired water bodies;	A, B	CG, SG	NP			
d) Organize a volunteer network of retiree stakeholders	A, B	SG	NP, CO			

interested in the improvement of water quality and monitoring exercises (see Environmental Alliance for Senior Involvement, EASI);						
7.3 Achieve an optimum ratio for diverse land use to include agricultural, forest open space, scenic areas, recreational lands, and sensitive ecological areas;						
a) Conduct a natural resource asset valuation study for all components of ecosystems that may be viewed as environmental capital with respect to the local and regional economy;	B	SG, CCU	NP			
b) Use innovative planning tools and other regulatory mechanisms to deter the development of areas deemed to be of critical importance to local ecosystem;	B	CG, MG, SG	DC			
7.4 Reduce pollutant contributions from point and mobile source air pollutants;						
a) Convene a Green Industry Council to oversee the implementation of incentives, credits and opportunities related to the pursuit of environmentally sensitive business practices;	A, B	CG, MG	BO, NP			
b) Identify renewable energy and fuel opportunities that may be harnessed by local business and industry;	C	SG	NP			
c) Conduct an organized public awareness campaign associated with all pollutants to local ecosystems highlighting that connection between economic development and environmental quality;	B	CCU	NP			
d) Ensure accuracy and accountability of data maintained by state and local environmental agencies;	A	SG, CG, MG	NP			
e) Conduct an epidemiology study in support of the connection between environmental quality prevailing health issues; use information to mitigate negative circumstances and as leverage to strengthen polices affecting the environment;	B	SG	HE			
f) Administer Green Certification Program to reward pursuit of environmentally sensitive design and	B	CG	DC, NP			

development;						
7.5 Enhance and expand eco- tourism business opportunities and resource education/awareness events that highlight the preservation and wise use of the county's natural resource base;						
a) Convene a nature based tourism partnership that focuses on the development of new heritage tourism, ecotourism and agritourism enterprises;	A, B, D	SG	CC			
b) Create a comprehensive public /private litter control and enforcement program modeled after successful initiatives in other areas;	B	CG, SG, MG	BO			
c) Engage corporate and business interests in making the fundamental connection between litter, environmental quality and economic development initiatives;	B	ED, CG, SG, MG	CO, BO			
d) Encourage urban adaptability for resource education programs such as 4-H and FFA to encourage integration into metropolitan school systems;	E	SD, SG				
Tourism						
8.1 Collaborate with state and local tourism partners to market Grand Strand tourism opportunities to a diversity of tourism markets and demographics;						
a) Engage a diversity of regional tourism interests in the formation of a Grand Strand Tourism Alliance for the purpose of collaborative marketing, planning and product development;	A, B	SG	CC, BO			
b) Convene a Tourism Leadership Council to serve as think-tank for strategic planning related to all components of the tourism industry;	A	SG	CC, BO			
8.2 Work with public and private sector tourism interests to promote the tourism industry;						
a) Work with state officials to market tourism as a significant component of a diversified economic development strategy; particularly in areas facing decline of traditional industry;	C	SG	CC, BO			
b) Celebrate the tourism heritage of coastal	B, D	SG, CCU	CC, BO			

communities by sponsoring a yearly tourism symposium hosted by the local collaborative interests;						
c) Seek public and private funding in support of collaborative tourism initiatives;	B	CG, MG	CC, BO			
8.3 Enhance tourism market sustainability, diversification, and expansion;						
a) Conduct a comprehensive demographics and market analysis for all tourism products and geographies that make up the region;	C	SG	CC, BO			
b) Create a tourism master plan that focuses on new product development, tourism market diversification, collaborative marketing, tourism asset sustainability, and tourism cluster expansion;	B	SG, CCU	CC, BO			
c) Highlight unique features of community identity for all areas that make up Horry County as a distinct marketable feature of a diversified tourism strategy;	C		CC, BO			
d) Utilize student resources available through local resort tourism programs to conduct a regular survey / questionnaire program to inform product development;	B, C	CCU	CC, BO			
e) Seek the assistance of international tourism consultant to assess tourist product offering and target market to appropriate demographics based on assessment;	B, D	SG, CG, MG	CC, BO			
f) Develop a countywide litter clean-up initiative for all local waterways and public lands in support of the development of new outdoor recreation and ecotourism opportunities;	B	SG, CG, MG	CC, BO, NP, CO			
8.4 Expand tourism season to target to cover the entire year with a diversity of tourism program and product offerings;						
a) Host regionally impacting activities such as road races, biathlon/triathlon events, golf tournaments, fishing tournaments and outdoor sporting events in the off-season;	B	CG, MG, CCU	CC, BO, NP, CO			
8.5 Accommodate all convention related business travel						

<p>through the expansion of current tourism infrastructure and development of new conference capacity;</p> <p>a) Seek the development of premier entertainment venue to host large capacity sports and entertainment opportunities;</p> <p>b) Conduct and economic impact study associated with the expansion and/or new development of convention center facilities;</p> <p>c) Develop a tourism manifesto to win support of local leadership and policy makers for the purposes of prioritizing capital improvements to the tourism infrastructure;</p>	B	SG, CG, MG	CC, BO			
	B, C	ED, MG, CCU	CC, BO			
	A		CC, BO			
Transportation						
<p>9.1 Work with local, state and federal leaders to secure the development of direct interstate access to the communities of the Grand Strand.</p> <p>a) Place a reporting member on I-73 Committee formed by the MB Chamber;</p> <p>b) I-74 from I-95 to Carolina Bays North Extension;</p> <p>c) Actively seek dedicated funding for prioritization of I-73 segments from I-95 to the beach; make connection with SC 22.</p>	A		NP			
	B	SG, CG, MG	CC, BO			
	B	SG, CG, MG	CC, BO			
<p>9.2 Facilitate needed expansion and growth of Myrtle Beach International Airport</p> <p>a) Marketing through a partnership with the state, NESAs, MBREDC that reaches out to industry associations, public and private;</p> <p>b) Work with local business organizations to supply the empirical data in support of expanded air passenger and freight capacity at all local airport facilities;</p>	A	ED, SG	BO, NP			
	A	CG	CC, BO			
<p>9.3 Facilitate the development of a comprehensive transit network in the form of light rail and buses.</p> <p>a) Seek long-term dedicated funding for COAST RTA through Coastal Alliance; use funding to leverage additional federal/state transportation resources;</p> <p>b) Study feasibility of increased rail capacity for existing</p>	B	SG, CG, MG	CC, BO			
	B	SG, CG				

<p>railroad infrastructure; Study the acquisition of additional railroad right-of-way property associated with new light rail, passenger and freight routes;</p>						
<p>9.4 Ensure primary and secondary road interconnectivity between neighborhoods and communities (reduce the number of cul-de-sac communities).</p> <p>a) Consider interagency planning relative interconnectivity for neighborhoods;</p> <p>b) Convene a collaborative leadership council that integrates land use and transportation policy issues with existing planning tools and practices;</p> <p>c) Tap into Green-TEA resources to promote connections between neighborhood walkability and healthcare issues;</p> <p>d) Promote outreach initiatives focused on educating the development community about planning policies and growth strategies;</p> <p>e) Encourage the development of planning ordinance that require roadway connectivity in compliance with comprehensive planning objectives;</p>	<p>A</p> <p>A</p> <p>B</p> <p>B</p> <p>B</p>	<p>CG, MG</p> <p>CG, MG</p> <p>CG, MG</p> <p>SG, CG, MG</p> <p>CG, MG</p>	<p></p> <p>DC</p> <p></p> <p>DC</p> <p>DC</p>			
<p>9.5 Acquire government incentives to increase mass transit, and energy efficient and economical transportation.</p> <p>a) Facilitate the development of alternative fuel infrastructure and fleet development for local, state and federal entities;</p> <p>b) Encourage the expansion of alternative fuel distribution capacity at strategic distribution nodes;</p> <p>c) Work with regional transit authority, educational institutions and municipalities to increase ridership through the development of comprehensive signage, wayfinding and marketing programs associated with transit operations;</p>	<p>B</p> <p>B</p> <p>A, B</p>	<p>SG, CG, MG</p> <p>SG, ED</p> <p>SG, CG, CCU</p>	<p></p> <p></p> <p>CC, BO</p>			
<p>9.6 Take proactive steps to mitigate traffic congestion along primary transportation corridors.</p> <p>a) Promote high density transportation measures along</p>	<p>B</p>	<p>SG, CG</p>	<p></p>			

primary traffic corridors such as US 17 and US 501 (HOV lanes, etc.);						
b) Require the inclusion of design elements that eliminate traffic congestion along major transportation corridors when adjacent properties are developed (i.e. frontage road segments, limited access, curb-cut consolidation, parallel routes, etc.);	B	SG, CG, MG				
c) Encourage frontage road build-out along US 501;	B	SG, CG	BO			
d) Encourage the development of parallel routes to primary beach corridors such as Postal Way and International Drive;	B	SG, CG, MG	BO			
e) Pursue the development of the Southern Evacuation Life Line Route as a limited access parallel alternative to US 501;	B	SG, CG,				
f) Encourage the application of flex time standards to limit congestive build-up along primary corridors;	A, D	CG, MG	BO			

Implementation Leaders

Public

MG -Municipal Government

CG - County Government

SG - State Government

ED - Myrtle Beach Regional Economic Development

CCU - Coastal Carolina University

HG - Horry Georgetown Technical College

SS - School System

U - Utilities

Private

CC - Chambers of Commerce

BO - Business Organizations

CO - Civic Organizations

NP - Non-profit Organizations

DC - Development Community

HE – Healthcare

APPENDIX

Timeline Exercise Results

Era	Positive	Positive & Negative	Negative
1950s	Opening of the Myrtle Beach Pavilion	Hurricane Hazel	Poor roads
*includes events prior to 1950	Founding of Coastal Carolina University	"King Tobacco"	Hurricane Hazel
	Myrtle Beach Air Force Base operation		Lack of higher education opportunities
	Federal tobacco subsidization		Poor water and sewer network
	Prevalence of the automobile		Poor education system
	Growth of the interstate system		Education availability/access
	Timber industry development		
	Founding of Santee Cooper		
	Horry Telephone/Electric Cooperatives		
	Intracoastal Waterway development		
	New schools construction (WPA)		
	Construction of Ocean Forest Hotel		
	Hurricanes		
	Hurricane rebuilding efforts		
	County location, strategic geography		
1960s	Positive	Positive & Negative	Negative
	Establishment of HGTC		Poor education
	School district consolidation		Poor water and sewer network
	Commercial Air Travel		
	Desegregation		
	Tourism expansion		
	Natural resource attraction		
	Shag dance invented		
1970s	Positive	Positive & Negative	Negative
	Growth of CCU		Manufacturing decline
	Weather Satellite		Lack of zoning
	Formation of GSWSA		damage to natural resources
	Building boom		
	Aux. built		
	Environmental Legislation		
	4-Laning U.S. 501		
	Golf Course Development		
	Home Rule policy		
	Chamber of Commerce influence		
1980s	Positive	Positive & Negative	Negative
	County-wide Zoning	Hurricane Hugo	Poor educational system
	MSA Designation		High interest rates
	Retail Growth/Boom		Loss of textiles
	Theatre Development		Air Force Base closure
	Hurricane Hugo		Savings and loan crisis
	Population growth and development		Tax changes
	Cable Television		damage to natural resources
	"Shag" the movie		
1990s	Positive	Positive & Negative	Negative

	Rapid population growth	AFB Closure	AFB closure/job loss
	Road improvements/ RIDE1		Waccamaw Pottery closure
	Retirement community transformation		IP release of land/pollution
	AFB closure		Hurricane Floyd
	International Paper release of land for Carolina Forest		Loss of family entertainment
	National chain entry into market		Real-estate downturn
	CCU split from USC		Poor education system
	Carolina Forest Development Agreement		Stress on roads
	Planned development concept		Growth problems
	Multi-county business park		No money or planning for public transportation
	Residential growth and development		Poor leadership
	Beach renourishment		Lack of emphasis on planning
	GRIP		Growth in environmentally sensitive areas (floodplain)
	Pelican Baseball		Development density
	Broadway at the Beach		
	Wendel @ B&C		
	AFB Redevelopment		
2000s	Positive	Positive & Negative	Negative
	Political debates/exposure	Growth of environmental activism-	Golf industry decline
	Hard Rock Theme Park	slows growth and adds expense	World Trade Center / 911
	International Investment	Golf course closures	Manufacturing outsourcing/jobs
	Highways 31 & 22	Baby Boomers retirement begins	Airport stalemate
	Year-round economy		Pavilion closure
	SWA/Clemson Project		Infrastructure needs/gaps
	Ripken Experience		Economic downturn
	Market Commons Project		Negative manufacturing demographic
	New leadership; better planning		Poor education
	School district/Tech./ University collaboration		Mortgage crisis
	Tobacco buyout- farmland developed		Iraq War
	Tobacco settlement		Business ethics
	RIDE II		Poor development
	Baby Boomer retirement begins		Overcrowded roads/schools/jails
	County-wide zoning		Natural resource pollution
	More of a family destination		
	More upscale hotels		

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

Strengths
Question 1
*What are the
community's
strongest resources?*

- .1) natural resources- beach, ICW
- .1) affordable/available industrial land in western portion of county
- .2) land, trees, beach
- .3) natural resources
- .4) tourism
- .4) natural resources
- .4) higher education
- .4) geographic size
- .4) diversity of the county
- .5) beaches
- .5) climate
- .5) workforce/work-ethic
- .5) institutions of higher education
- .6) natural resources, beaches, rivers, marsh
- .6) CCU, cooperative efforts from government
- .6) collective advertising
- .6) air-service
- .7) geographic location of the county
- .7) schools systems
- .7) year-round recreation opportunities
- .7) leadership
- .8) higher education: HGTC and Coast Carolina University
- .8) Academy for Arts, Science and Technology
- .8) water resources: oceans, rivers, wetlands, and ICW
- .8) tourism cluster
- .8) climate and effect on in-migration of retirees
- .8) location and abundance of raw land
- .8) historic resources
- .8) airports
- .8) low taxation
- .8) aging population: knowledge base, experience
- .9) educational system, PK-16
- .9) beach
- .9) local chambers of commerce
- .10) climate
- .10) location
- .10) continued marketing to promote area for recreation and retirement
- .12) yea-round weather
- .12) good schools- University and HGTC
- .12) golf
- .12) reasonable taxation
- .12) responsible governments
- .13) tourism, history...the ability to promote
- .14) climate
- .14) Quality of Life
- .14) Education system relative other SC counties
- .14) Higher education
- .15) strong identity with travel and tourism industry
- .15) marketability through tourism
- .16) commitment to growth

	.16) great place to live
	.16) vibrant tourism and retirement economy
	.16) good public education system
	.16) abundance of land for growth
Strengths	.1) CCU students retention
Questions 2	.1) airport
<i>What resources could with support become a strength?</i>	.3) natural resources through promotion of eco-enterprise
	.4) roads
	.4) infrastructure for growth
	.4) natural resources
	.5) roads
	.6) economic tourism
	.6) history of the area
	.8) hospitals, medical facilities
	.8) agricultural land
	.8) cultural amenities (parks, museums, historic properties, landscapes)
	.8) open space, environmentally sensitive lands
	.8) retiree-entrepreneurs
	.8) creative class
	.8) politicians (support through education)
	.8) developers (support through education)
	.9) quality of life
	.9) entertainment/recreation
	.9) healthcare
	.10) destination for major conventions
	.11) our people
	.12) attractive to entrepreneurial companies
	.13) more roads
	.14) airport
	.15) promotion of Myrtle Beach as destination for business conventions, trade shows and expositions during the off-season
	.16) economic development board
	.16) infrastructure
Weakness	.1) transportation system- no interstate links
Questions 1	.1) access to more highly skilled workforce
<i>What are the liabilities that can limit achievement of local economic development?</i>	.1) tourism and service sector limits areas ability to recruit industry
	.3) pollution, habitat destruction
	.3) local decision making
	.4) roads
	.4) lack of intergovernmental unity for all municipalities in Horry
	.4) lack of coordinated planning
	.4) unplanned/uncontrolled growth
	.5) lack of roads and cost of land
	.6) lack of affordable air-service
	.6) poor airport facilities, lack of international flights
	.6) lack of interstate access
	.7) lack of proactive leadership
	.7) funding of projects
	.7) lack of infrastructure
	.7) hurricane potential

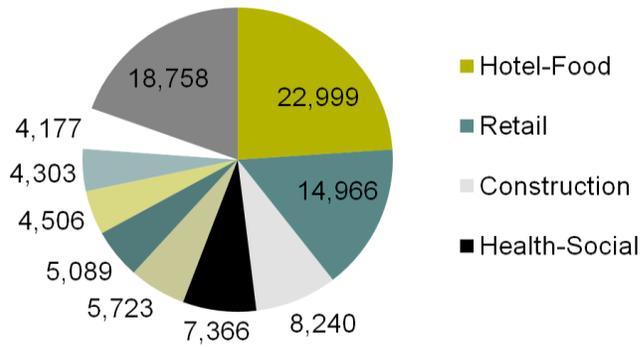
	.7) port capability or lack thereof
	.8) Transportation network and accessibility: mass transit, lack of major interstate, inadequate state infrastructure funding
	.8) narrow economic base
	.8) low wages
	.8) aging and insufficient infrastructure
	.8) insufficient tax system, resources
	.8) inadequate development controls, unsustainable
	.8) Lack of political vision
	.8) cultural and historic resource preservation
	.8) environmental protection
	.9) limited resources/critical infrastructure: fire, police, schools
	.10) airport
	.10) excessive traffic volumes
	.10) lack of trained workforce
	.11) overcrowded and poorly maintained roads
	.11) overcrowded and poorly maintained schools
	.11) inadequate pay for teachers, firemen, police, EMS personnel
	.11) mismanaged, out of control development
	.11) high insurance costs
	.13) road system
	.13) lack of industry
	.14) lack of air transportation
	.14) lack of interstate roads
	.16) past history of failure; lack of public confidence
	.16) lack of marketing for effort
Weakness Questions 2 <i>What are the constraints that restrict the accomplishment of local economic development initiatives?</i>	.1) territorial political environment
	.1) lack of intergovernmental/regional coordination
	.3) lack of understanding of potential economic benefits of natural resources
	.4) economic outlook
	.4) lack of adequate roads
	.4) housing market slump
	.5) tourism
	.5) lack of infrastructure
	.5) educated workforce or lack thereof
	.5) roads
	.6) no interstate connector
	.6) lack of cultural amenities
	.6) perceived poor schools
	.6) lack of coordinated economic development
	.7) manufacturing opportunities are limited as result of policy and location of county
	.8) transportation inadequacies
	.8) lack of economic diversification
	.8) dependency of tourism constrains diversification
	.8) lack of proactive planning
	.9) opposition from service sector
	.10) workforce issues
.10) location (half of trade area is water)	
.10) inadequate roads	
.11) negative word of mouth advertising	
.11) lack of public and/or political will to find innovative, effective, solution to development,	

	<ul style="list-style-type: none"> infrastructure and natural resource issues created by rapid growth .14) uncooperative political entities .14) affordable housing for workers .14) unwillingness to diversify tourism economy .16) lack of infrastructure .16) lack of research university
<p>Opportunities Question 1 <i>What opportunities exist for maximizing, enhancing, or existing strengths that have been identified?</i></p>	<ul style="list-style-type: none"> .1) recruit industries to leverage physical resources-utilize ICW for commerce .3) economic incentives for protection of natural resources- low impact dev. .3) ecotourism .4) plan for roads now .4) plan for infrastructure to support new communities .4) interagency collaboration .4) planned growth .4) care for natural resources .5) additional roads (I-73) .6) coordinated marketing for area .6) change airport from service agency to marketing agency .7) infrastructure development .7) partnering with educators and business leadership .7) promotion of recreation opportunities .7) develop infrastructure .7) additional forward thinking schools (new technology) .7) promotion of year-round recreation .7) attract brightest minds to the area .9) increased funding for advertising .9) improved public transportation .9) coordinated planning between counties and municipalities .10) legislative coalitions to address coastal issues .10) opportunities for new employment .11) healthy, sustainable infrastructure and economy .11) balance development with infrastructure .11) form a county economic leadership team composed of representatives, developers, hospitality industry, environmentalists, businesses, taxpayers, to present a unified plan to the public and provide political cover for our elected officials .13) more support for incubators and aspiring entrepreneurs .13) more community collaborations .16) get I-73 built .16) get funds so that CCU can advance their academic mission .16) plan for business parks along 1-73
<p>Opportunities Questions 1 <i>What improvements could identified weaknesses benefit from?</i></p>	<ul style="list-style-type: none"> .1) I-73 critical to transportation and infrastructure improvements .3) job opportunities associated with natural resource protection .3) tax and other incentives to promote local resources .4) community coalition- collaborative issue engagement .6) coordinated government efforts to improve air-service .6) collaborative lobbying of state and federal delegations .9) improved intergovernmental coordination .9) dependable revenue streams .10) expanded airport operations .10) development of 1-73 .11) balance development with infrastructure

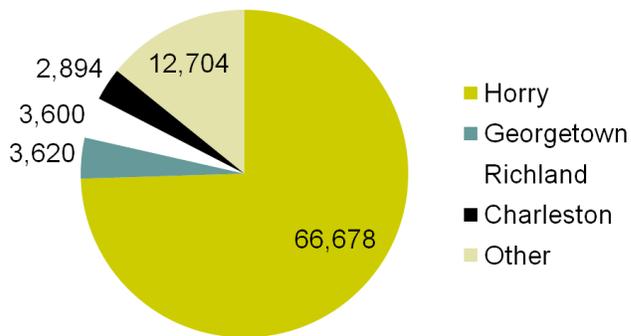
	.13) more federal and state funding for road systems
	.13) tax incentives for industry
	.16) cooperation and public acceptance from political entities
Opportunities	.3) National and international recognition of unique natural resources
Question 2	.6) Increased visitor stops via interstate connector and air-service
<i>What opportunities external to the community can be identified for each category?</i>	.6) enhanced emergency evacuation routes
	.6) new road networks open up additional areas of county for development
	.6) decreased congestion on existing road networks
	.7) opportunities in foreign countries
	.7) networking with educators and business leaders from other states and countries
	.10) legislative actions
	.11) state and federal grants
	.13) more federal and state funding
	.16) funds from SC and federal governments
Threats	.3) Rapid development at expense of natural resources
Question 1	.3) Private gain at expense of common good
<i>What threatens identified strengths?</i>	.3) Urban and suburban sprawl
	.3) Lack of vision concerning natural resources
	.4) Not working together across geographic boundaries, lack of unity
	.6) poor communication/coordination between government entities
	.6) poor press as it relates to inter-government communication
	.7) global warming (storms)
	.7) lack of open-minded leadership
	.7) fear of change
	.7) funding
	.7) personalities
	.9) failure to grow infrastructure to accommodate growth
	.9) catastrophic weather event
	.10) air and water quality
	.10) traffic volume problems
	.11) building on top of wetlands and not respecting natural resources
	.13) economy, gas prices
	.13) lack of direct air carriers
	.13) traffic flow
	.14) hurricanes
	.14) increasing housing costs
	.16) lack of interest from general community
	.16) no funds from government
Threats	.3) failure of government to address natural resource protection priorities
Question 2	.3) lack of knowledge regarding economic benefit of resource protection
<i>What threatens the realization of identified opportunities?</i>	.4) poor economy could severely impact area due to lack of diversification
	.6) poor communication between governments, no clear defined roles
	.9) failure to grow infrastructure to accommodate growth
	.9) catastrophic weather event
	.10) federal and state funding for coastal initiatives
	.10) workforce constraints
	.11) development interests in Conway and Columbia
	.13) economy, gas prices
	.13) lack of direct air carriers

	.13) traffic flow
Threats	.3) Fear that resource protection will infringe on private property rights
Question 3	.3) inadequate protection of natural resources through zoning and land use controls
<i>What weaknesses threaten to become worse and under what circumstances?</i>	.4) roads must be properly maintained to attract growth and visitors
	.6) lack of leadership to move air-service projects forward
	.6) federal /state perception of community feuding
	.7) unconcern of leadership
	.9) unstable funding sources
	.10) federal and state assistance
	.10) automobile congestion
	.11) continuing lack of sufficient revenue to balance infrastructure with development
	.13) without federal or state funding, road network will deteriorate

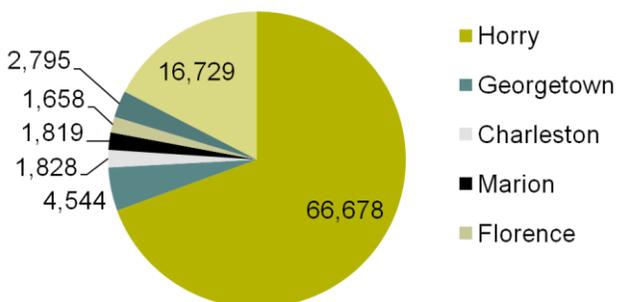
Distribution of Horry County Jobs by Major Sector (2004)



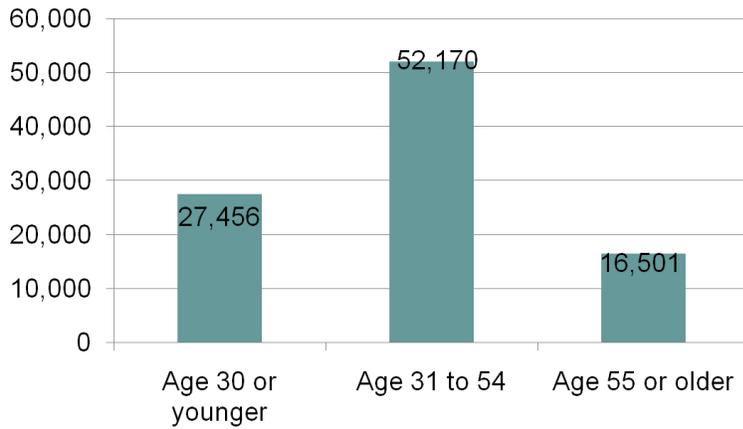
Jobs in Counties Where Horry County Residents are Employed (2004)



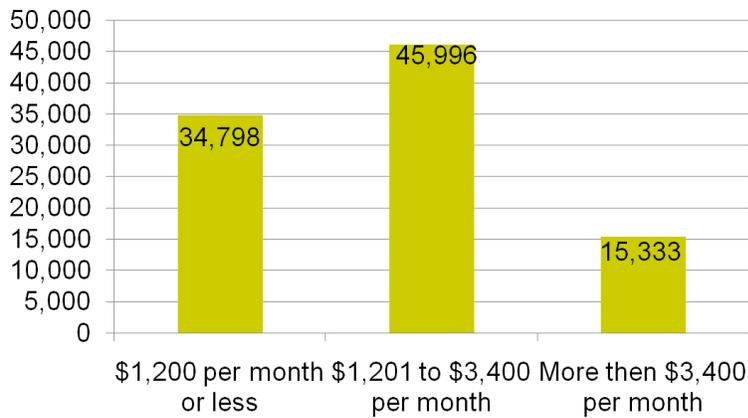
Counties Where Horry County Job Holders Reside (2004)



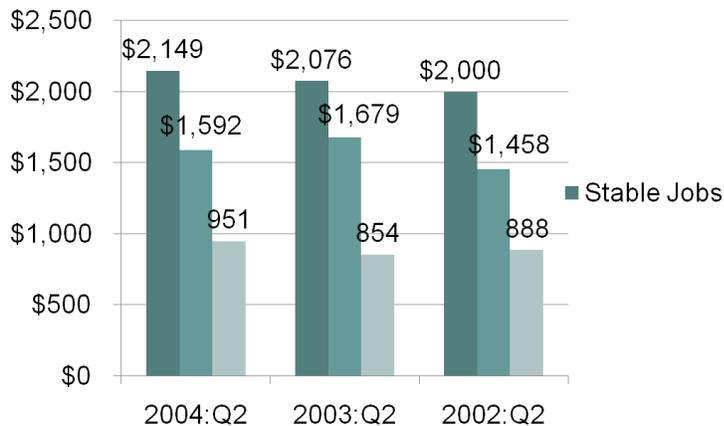
Age Distribution for Horry County Workers (2004)



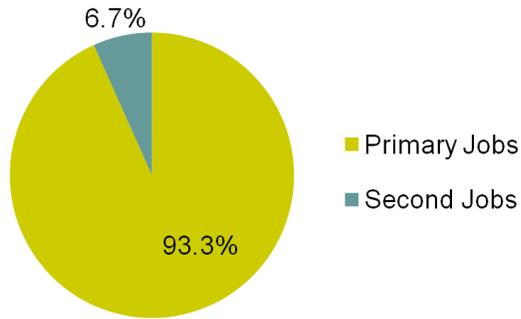
Monthly Pay Distribution for Horry County Worker (2004)



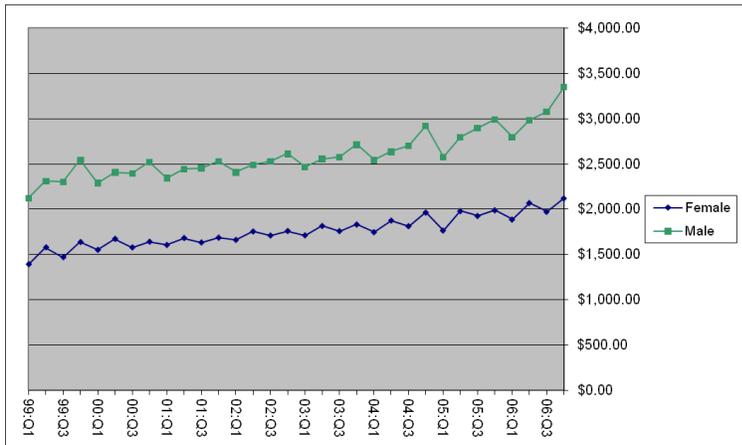
Monthly Pay for Horry County Workers in Stable Jobs (2004)



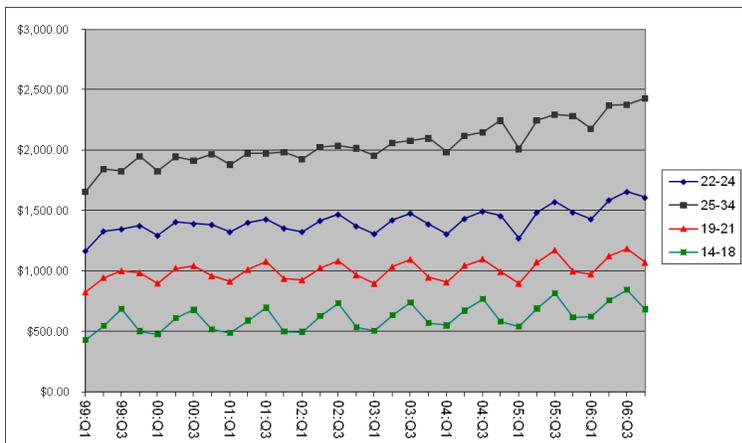
Percent of Horry County Jobs that are Second Jobs



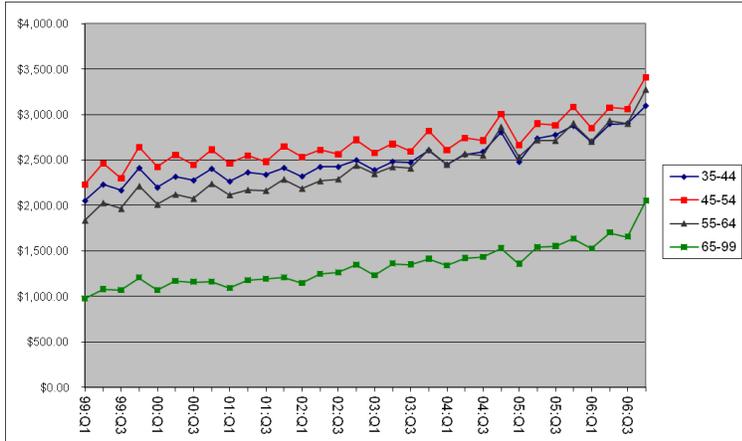
Monthly Pay for Horry County Workers by Gender (1999 to 2006)



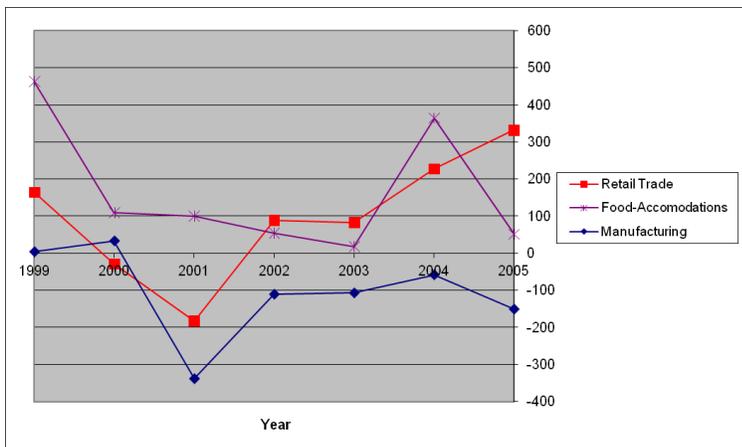
Monthly Pay for Horry County Workers by Age Group (Younger Workers) 1999 to 2006



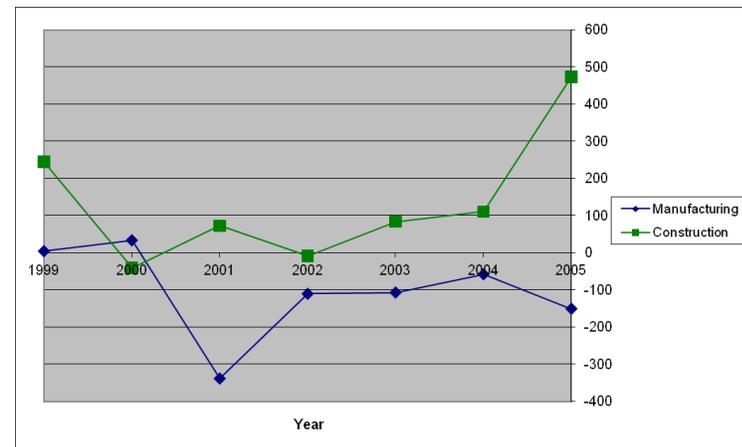
Monthly Pay for Horry County Workers by Age Group (Older Workers) 1999 to 2006



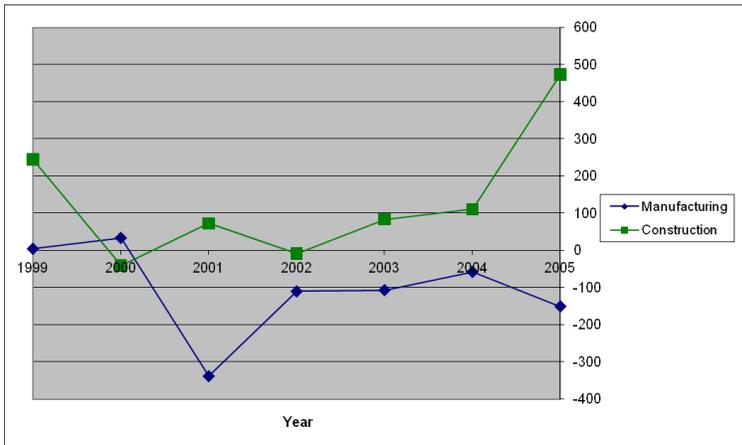
Net Job Flows Horry County Manufacturing vs. Selected Sectors (1999 to 2005)



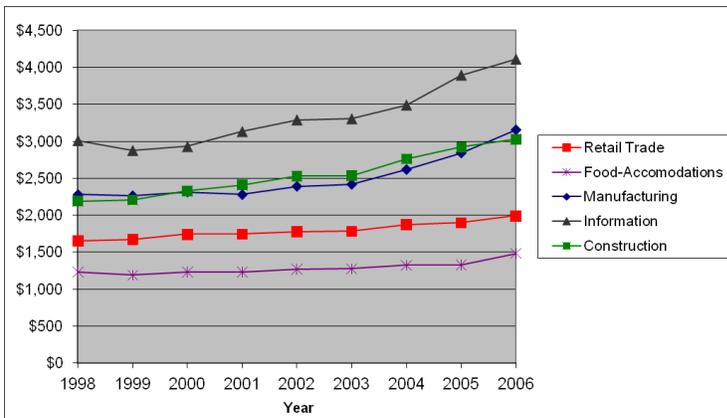
Net Job Flows Horry County Manufacturing vs. Construction (1999 to 2005)



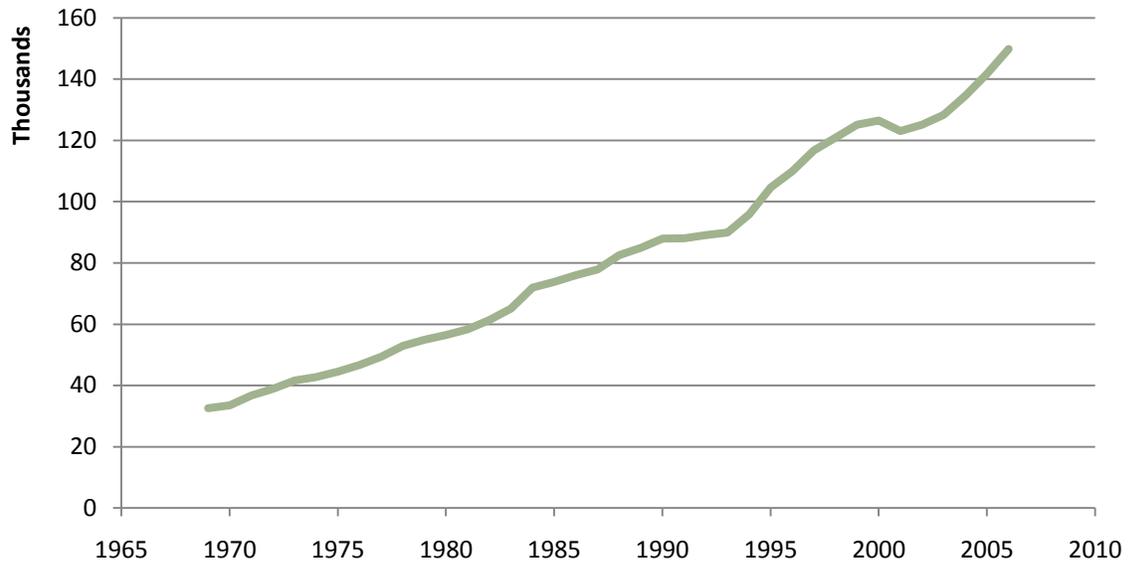
Turnover Rates for Horry County Selected Sectors (1998 to 2006)



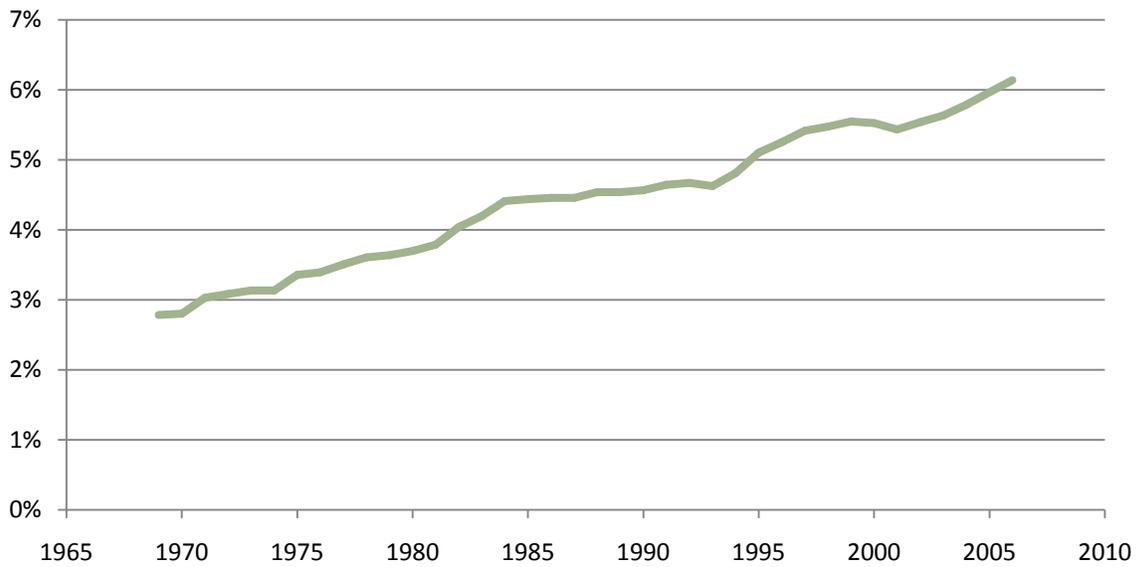
Horry County Monthly Pay, Selected Sectors (1998 to 2006)



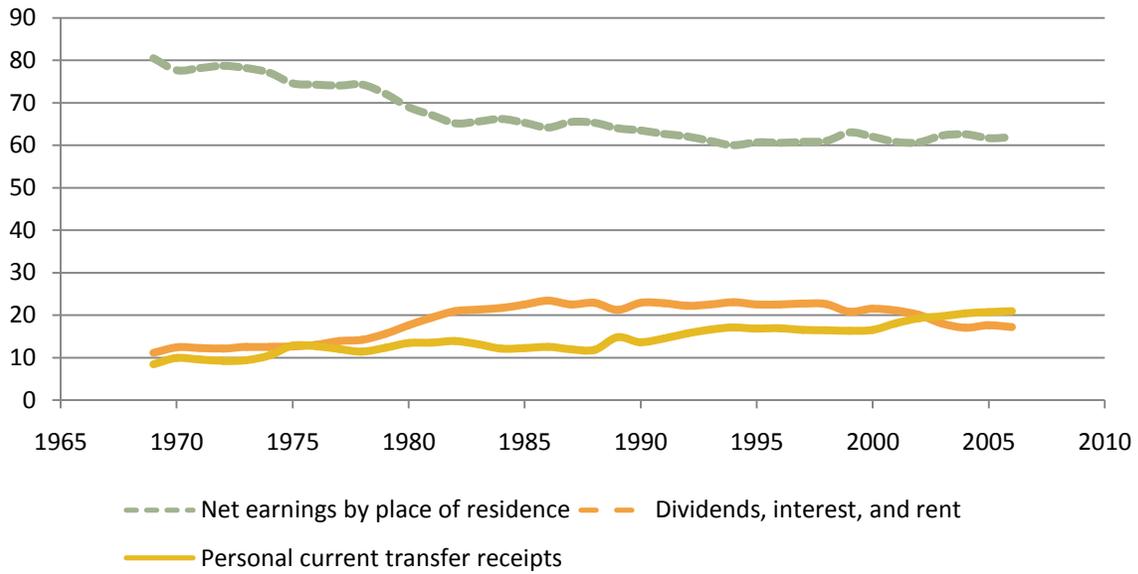
**Total Employment
Horry County**



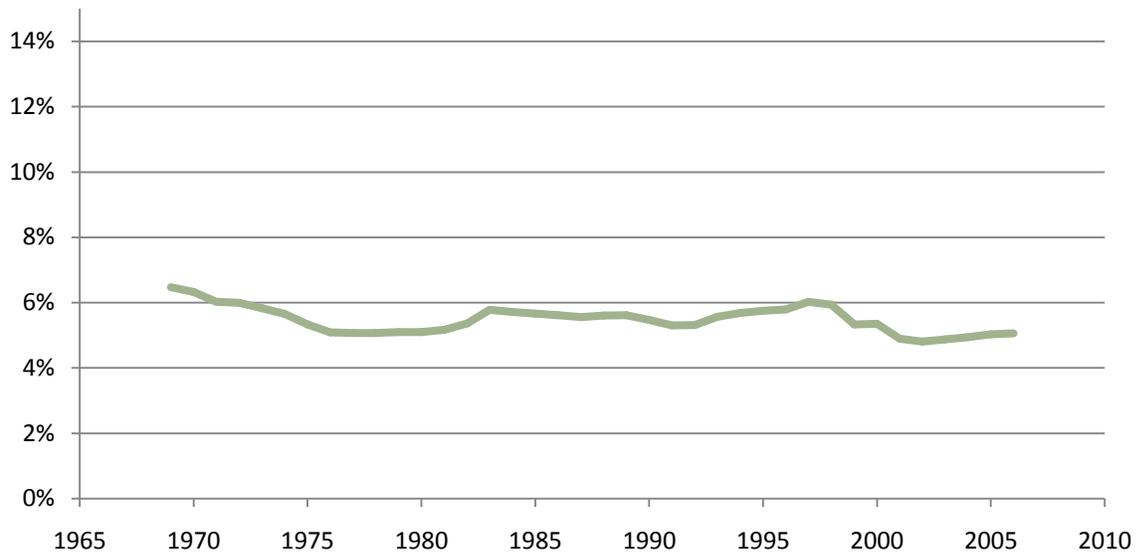
**SC Total Employment Share
Horry County**



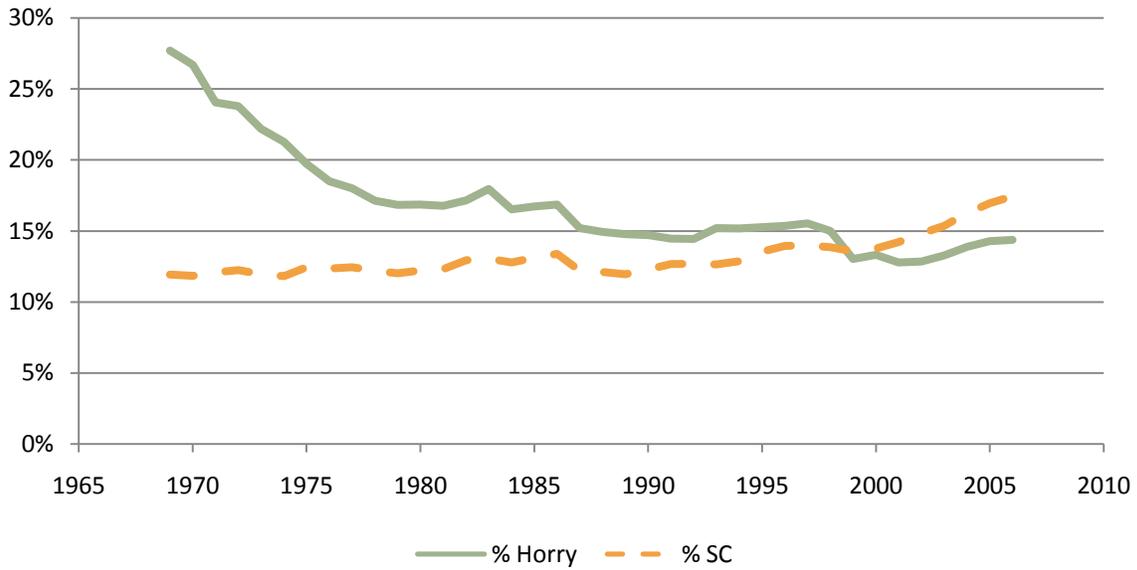
**Personal Income Components
Horry County**



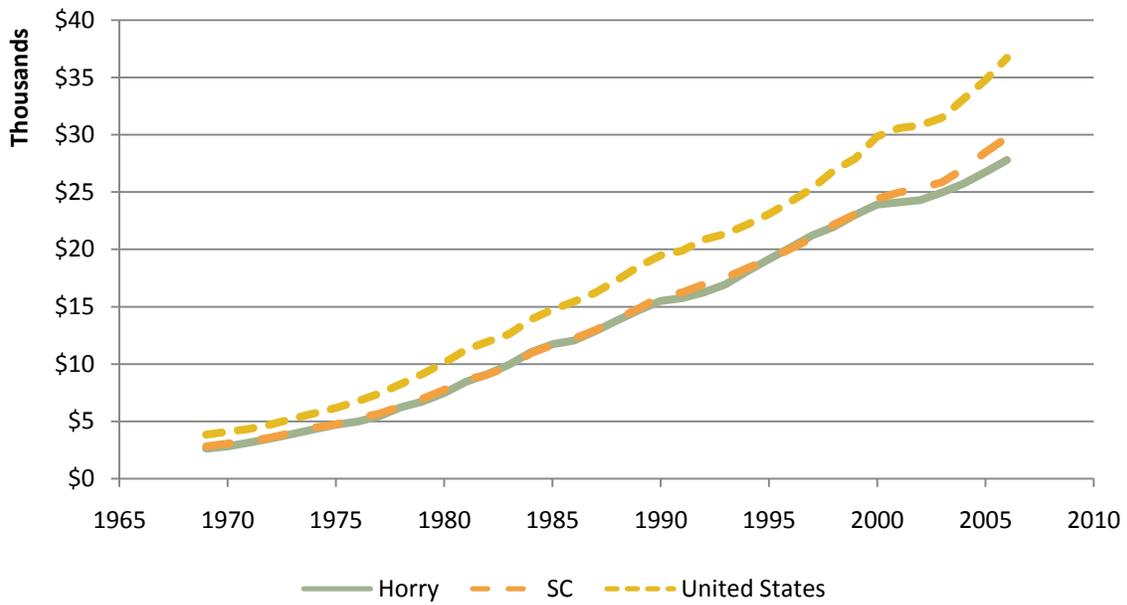
**Proprietor Employment Ratio
Horry County to SC**

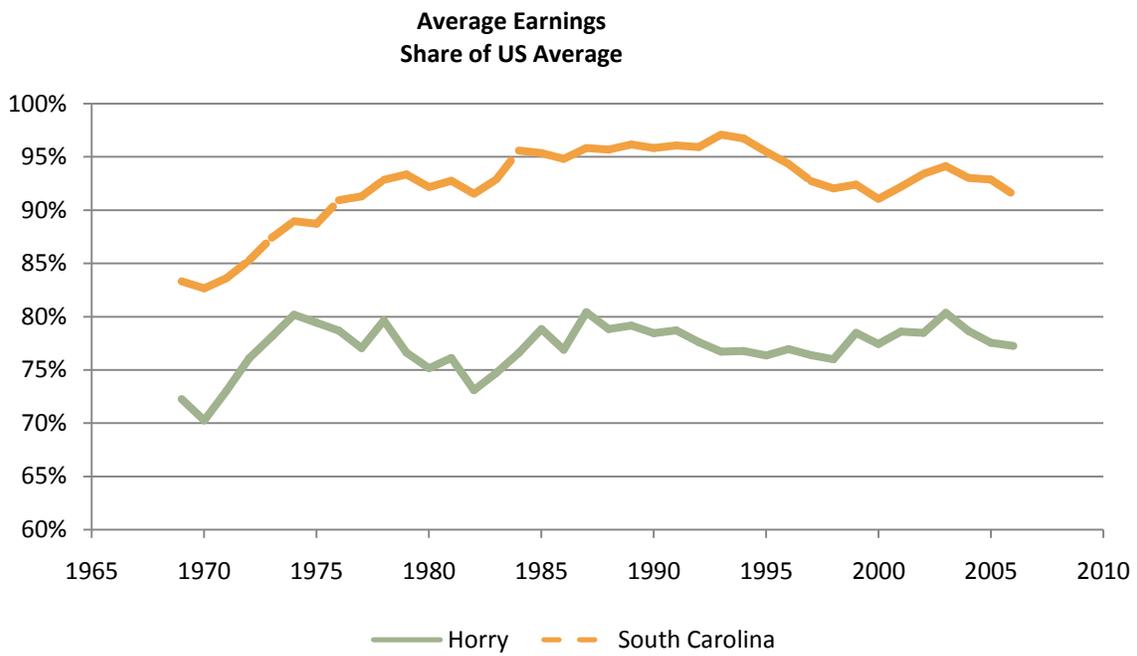
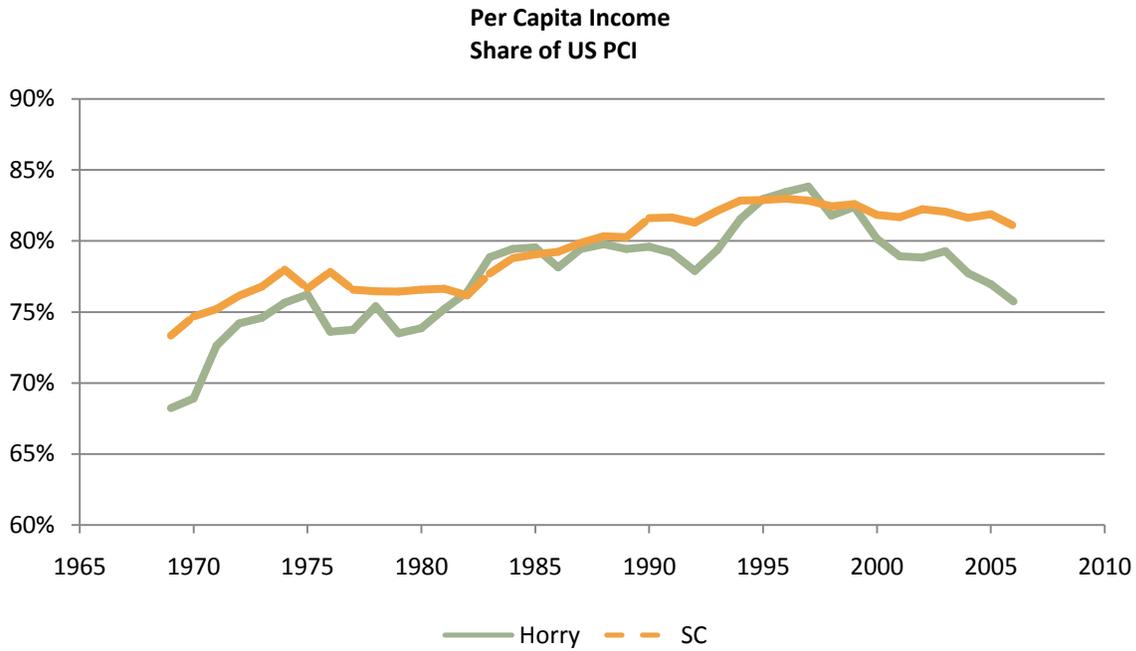


**Proprietor Employment Share
Horry County vs. SC**



Per Capita Income





Empirical Data Conclusions

Average Earnings

- Stagnating around 77% of the national average

- Contributing to Net Labor Earnings Share and Per Capita Income
- Difficulty in creating and maintaining higher paying jobs

What Does It Mean?

- The local economy seems to be healthy in terms of employment
- However, data indicates areas the need and room for improvement

Areas for Improvement

- Average Earnings, Net Labor Earnings, and Per Capita Income
- Indicate need to encourage
 1. Higher paying jobs
 2. Entrepreneurial Activity
 3. Industry Diversification

Which Economic Activities?

- Basic Activities
 - Drivers of Local Economic Growth
 - Usually result in Inflows of Revenue
- Non-Basic Activities
 - Usually result in Revenue Lost
 - Usually indicate opportunities for improvement

Which Economic Activities?

- Basic Activities: Service, Tourism, and Real Estate related
- Non-Basic Activities: Manufacturing, Professional Services, Health and Education, and Transportation

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