

# SEDA Board of Directors Meeting Propel Savannah

May 14, 2019  
10:30 a.m.



Propel Savannah  
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# Propel Savannah

- Provide an updated competitive assessment of the region and evaluate target industries with the greatest potential to foster strong economic growth into the future.
- Give SEDA and our region a road map to leverage our assets and help us reach our economic growth and diversification goals.
- Build upon existing economic development efforts, community organizations, programs, resources and assets.





## PHASE 1

Setup and Stakeholder Engagement

- Interviews
- Focus Groups
- Online Surveys through August 31st



## PHASE 2

Competitive Positioning Analysis

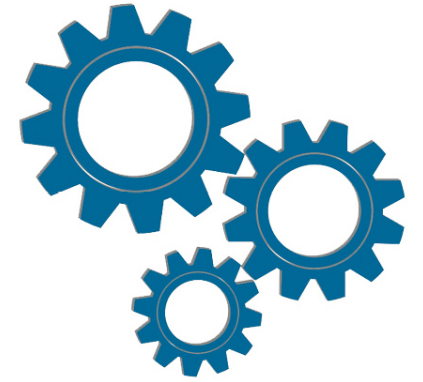
- SWOT Analysis
- Competitive Benchmarking



## PHASE 3

Target Industry Analysis

- Target Industry Business Case Analysis



## PHASE 4

Economic Development Plan

- Strategic Recommendations
- Best Practices
- Implementation Matrix

# Stakeholder Engagement

- Steering committee was formed of business and community leaders as well as staff to guide the process.
- Angelou Economics conducted more than 900 resident and business surveys through online, focus groups and one-on-one meetings.

# SWOT

Strengths	Weaknesses
Logistics infrastructure: Port of Savannah, rail, interstates	Persistently high poverty rates
Diverse economic drivers (manufacturing, logistics, tourism, healthcare, edu/gov/military)	Underperforming K-12 schools
Higher education institutions	Crime
Military assets	Inadequate skilled workforce / lack of soft skills
Favorable cost of living compared to other national MSAs	Capital is limited for small business community / entrepreneurs
Historical preservation and cultural richness	Small number of headquarters leading to few corporate leaders active in community and economic development
Strong tourism market	Lack of advancement for new leadership and lack of openness to new ideas
Ability to draw people back after years away	Limited opportunities for young professional's career advancement
Quality of life	Limited public owned land available to attract high wage projects
Opportunities	Threats
Retain and attract more talent	Lack of coordination between governmental entities
Further diversify economic base	Perception of crime and public education limits progress
Continue efforts to attract affluent visitors, lengthen visitor stays and increase spend	Limited public transportation for workforce
Grow entrepreneurial resources and support entrepreneurship	Companies unable to scale in Savannah
Increase air service and lower costs, i.e., LA	Environmental threats
Invest in GSU as the regional university with the greatest potential to achieve a high level of research talent	Status quo bias
Develop infrastructure and ecosystem as well as local and regional support for the entertainment production industry	Land assets not always developed for highest and best use from an employment perspective (i.e. high wage companies)
Leverage WTC Savannah and other assets to increase int'l trade and investment	Shortage of teachers and principals
Continue to partner with SCAD to advance creative technology industries and entrepreneurship	Trade wars and other temporary global economic challenges that arise

# Competitive Positioning Assessment

- Understand Savannah's economic and demographic data.
- Measure strengths and weaknesses along with current and future economic trends.
- Benchmark against three cities that Savannah competes with on a regular basis: Charleston, SC (pop. 775,831); Houston, TX (pop. 6,892,427) and Jacksonville, FL (pop. 1,504,980)

# Competitive Positioning Assessment

SCORECARD RANKING AND PERFORMANCE					
Assessment Rationale	Community Factor	Leading	Strong	Average	Lacking
<ul style="list-style-type: none"> <li>High growth in net new business formation</li> <li>Competitive tax and utility rates</li> </ul>	<b>Business Climate</b>	○			
<ul style="list-style-type: none"> <li>Low ability to attract/retain skilled workers</li> <li>Workers struggle with basic soft skills</li> </ul>	<b>Workforce</b>				○
<ul style="list-style-type: none"> <li>World-class colleges and technical schools</li> <li>Limited R&amp;D expenditures</li> <li>Poor perception of K-12 schools</li> </ul>	<b>Education</b>			○	
<ul style="list-style-type: none"> <li>Access to historical/cultural/beach assets</li> <li>Highly sought-after pace of life</li> <li>Affordable housing challenges</li> </ul>	<b>Quality of Life</b>		○		
<ul style="list-style-type: none"> <li>Port of Savannah &amp; military installations</li> <li>Diverse business/industrial/mfg. parks</li> </ul>	<b>Infrastructure</b>		○		
<ul style="list-style-type: none"> <li>SEDA produces/promotes quality materials</li> <li>World Trade Center captures int'l markets</li> </ul>	<b>Marketing</b>		○		
<ul style="list-style-type: none"> <li>Skilled and sophisticated staff</li> <li>Proactive and aggressive mindset</li> </ul>	<b>Economic Development</b>	○			



# Target Industry Analysis

Economic Development Activities	Manufacturing & Logistics	Creative & Technical Services	Entertainment Production	Health Care
<p><b>Core Industries:</b> <i>Retention &amp; Expansion</i></p>	<ul style="list-style-type: none"> <li>Warehousing &amp; Distribution</li> <li>Transportation Equipment Manufacturing: Aerospace, Heavy Equipment, &amp; Marine</li> <li>Export Commodity Manufacturing: Machinery, Paper, &amp; Chemicals</li> <li>Specialty Foods and Beverages</li> </ul> <p><i>Employment Target: 50-100 employees</i></p>	<ul style="list-style-type: none"> <li>UI/UX Design</li> <li>Architectural &amp; Engineering Services <i>(promotion in expanding existing companies nationally and internationally)</i></li> <li>Graphic Design</li> </ul>	<ul style="list-style-type: none"> <li>Entertainment Production (Film, TV and Commercials)</li> </ul>	<ul style="list-style-type: none"> <li>Hospitals &amp; Outpatient Care Centers</li> <li>Individual &amp; Family Services</li> <li>Nursing</li> </ul>
<p><b>Diversification Targets:</b> <i>Attraction, Entrepreneurship, &amp; Small Business Development</i></p>	<ul style="list-style-type: none"> <li>OEMs: Automotive and Aerospace</li> <li>OEM Suppliers: Automotive and Aerospace</li> <li>Assembly and Manufacturing related to existing Warehouse and Distribution</li> </ul> <p><i>Employment Target: 50-100 employees</i></p>	<ul style="list-style-type: none"> <li>Product Design &amp; Development</li> <li>Game Design &amp; Development</li> <li>Computer Animation</li> <li>VR &amp; AR Technologies</li> <li>Software Design and Development</li> </ul>	<ul style="list-style-type: none"> <li>Sound Stages</li> </ul>	<p>There is an opportunity in the Savannah region to expand the health care and health tech industry. This plan must be driven by existing leaders and experts within the field.</p> <p><b>Suggested Fields:</b> <i>Public Health, Health Analytics, Physical Therapy, Nutrition, Audiology, Occupational Therapy, Physicians Assistants, Medical Lab Sciences, Radiology, and Respiratory Health Services</i></p>
<p><b>Entrepreneurial &amp; Emerging Targets:</b> <i>Expansion, Attraction, Entrepreneurship, &amp; Small Business Development</i></p>	<ul style="list-style-type: none"> <li>Logistics Technology Focus within Incubators/Accelerators: Advanced Logistics Software and Sensors, component and software development for transportation industry</li> <li>Medical Devices &amp; Equipment Manufacturing</li> <li>Renewable Energy Technologies</li> </ul> <p><i>Employment Target: 50-100 employees</i></p>	<ul style="list-style-type: none"> <li>Digital Media and Creative Technology Focus within Accelerator/Incubator</li> </ul>	<ul style="list-style-type: none"> <li>Pre and Post Production Services</li> </ul>	<ul style="list-style-type: none"> <li>Health Care Technology Focus within Incubators/Accelerators</li> </ul>

# Summary Highlights

- This effort validated and expanded the direction we have been moving since our 2011 SRI plan. We are on the right track.
- It put much greater emphasis on identifying and advancing innovation and entrepreneurship related to our largest industries.
- Healthcare was added as a potential target to be explored with experts in the industry, a process we imagine to be similar to what we have done with entertainment production. What can SEDA reasonably do to help grow and strengthen this industry sector?
- Suggestion to focus on the attraction of small to mid-size manufacturers of 50-100 employees as possible to balance and diversify our manufacturing base, while continuing to respond with our best efforts to the mega-projects that consider our area.

# Strategic Action Plan Goals

- **Economic Development:**  
Unite Greater Savannah with a Cohesive Vision
- **Entrepreneurship:**  
Develop a World-Class, Holistic Approach to Entrepreneurship
- **Education and Workforce**  
Maximize Savannah's Human Capital
- **Community Capacity Building:**  
Create Economic Opportunity for all Savannahians

# Economic Development

This includes much of what we are already doing so you will see a lot of words like continue and expand. However, there are some new ideas and areas we can improve.

- **Develop a world-class economic development marketing and attraction program**
  - Tasks here include the “continued” development of SMC, collaboration with the I-16 JDA and others, implementing an aggressive marketing plan, working with major employers to identify expansion opportunities and/or attract supply chain, hosting fam tours and making sales calls to site location consultants, state project managers and business media, etc.
  - Some new ideas include exploring a united brand strategy and evaluating importers for potential to assemble/manufacture here.

# Economic Development

- **Expand the Business Retention and Expansion**
  - Continue to identify needs of businesses and help them grow and expand.
  - Better promote BRE program and celebrate successes, explore development of a BRE incentive for growth.
- **Celebrate economic success**
  - Strengthen the promotion of new corporate announcements, create employer awards, develop content around existing business success and aggressively promote it.
- **Leadership**
  - Energize, strengthen and invest in leadership programs and ensure participants are connected to opportunities for leadership i.e., boards, political office, etc.

# Entrepreneurship

- **Foster a collaborative entrepreneurial ecosystem**
  - Host quarterly ecosystem meetings, re-energize regional university focus and participation, lobby for greater support from state organizations like ATDC, TAG and others, etc.
- **Catalyze a complete funding continuum for entrepreneurial endeavors**
  - Reinstitute Georgia Angel Investor Tax Credit, promote Georgia's Entrepreneur and Small Business Loan Guarantee Program, establish an Angel Fund, leverage EDA RIS seed fund grant, encourage existing industry to fund innovation and become early customers for start-ups.
- **Create a startup accelerator/incubator**
  - Focus on digital media/creative design, logistics technology and health technology.

# Entrepreneurship

- **Create a narrative around Savannah as an innovation and entrepreneurial mecca**
  - Find and tell stories of local technology companies, support business pitch competitions, fund promotion of Creative Coast blog into an online resource for storytelling for Savannah entrepreneurs and innovation.
- **Create an entrepreneurial/innovation destination event**
  - Rename and invest in Geekend to include full time conference director and staff, attract and pay high-quality well known speakers as well as a global marketing campaign.

# Education and Workforce

- **Empower Savannah's business and education leaders to become more engaged partners**
  - Explore creating a community organization to empower committed senior business leaders to identify and implement solutions tailored to the Savannah region; increase student outcomes, access grant money from national sources, expand dual-enrollment and career academies, develop youth entrepreneurship programs and advance financial literacy efforts.
- **Adapt to millennial/non-traditional adult learners**
  - Expand digital learning, integrate coding curriculum into public and private schools, promote Georgia Tech's Coding Bootcamp.
- **Widen the workforce pipeline**
  - Broaden apprenticeship/customized training programs with Savannah Tech, improve pathway from military service to private sector employment, create a focus intent around reincorporation of convicted felons.



# Education and Workforce

- **Provide Access to Affordable, Quality Child Care**
  - Establish Public-Private Childcare Collaborative, expand Quality Care of Children's BOOST: Making College Possible initiative, explore incentive for quality childcare providers in census tracts with poverty above a certain threshold, explore incentives for employers that subsidize childcare.
- **Increase the Amount of Affordable workforce housing available**
  - Continue to develop a comprehensive affordable and workforce housing strategy, adopt inclusionary zoning.
- **Establish community scholarships for impoverished children**
  - Create a community scholarship program for at-risk youth on a scale not heretofore seen in Savannah.

# Community Capacity Building

- **Invest in infrastructure**
  - Continue to support SHEP, Mason Mega Rail Terminal, and \$10 billion statewide transportation improvement plan, build entertainment production facilities and sound stages, implement “Smart City” projects, promote quarterly meeting with City development services and local real estate reps.
- **Pursue University economic development**
  - Create endowed chairs with expertise in target industries at Savannah area universities that have undergraduate studies, capture more research dollars through national funding sources, bolster GSU ranking as a R-2 university, identify ways to support SSU R&D activities, promote and increase enrollment at STC.
- **Rethink Economic Development incentives**
  - Analyze and adjust current incentives for logistics to more closely align with desired outcomes i.e., higher-wages, more employees per sf, hiring former convicts, environmentally friendly construction and/or operations, etc., continue entertainment production and creative technology incentives, etc.

# Propel Savannah Steering Committee

Jen Bonnett, SEDA & The Creative Coast

Anna Chafin, Development Authority of Bryan County

Loretta Cockrum, Foram Group, Inc.

John Coleman, Bontiz of Georgia, Inc.

Jason Coley, Georgia Power

Leia Dedic, SEDA

Mayor Eddie DeLoach, City of Savannah

Manny Dominguez, City of Savannah

Reed Dulany, Dulany Industries, Inc.

Truitt Eavenson, Georgia Power

John Petrino, Georgia Ports Authority

Nina Gompels, NTG Enterprises

Brynn Grant, SEDA & World Trade Center Savannah

# Propel Savannah Steering Committee

Angela Hendrix, SEDA

Brandt Herndon, Effingham County Industrial Development Authority

Paul Hinchey, St. Joseph's/Candler Health System

Bill Hubbard, Savannah Area Chamber of Commerce

Kevin Jackson, EnviroVac

Dr. Ann Levett, Savannah-Chatham County Public School System

Dr. Kathy Love, Savannah Technical College

Frank Macgill, Hunter Maclean

Jay Neely, Gulfstream Aerospace Corp.

Greg Parker, The Parker Companies

Al Scott, Chatham County

Lee Smith, Chatham County

Benjy Thompson, Development Authority of Bulloch County

Trip Tollison, SEDA

# Next Steps

- Prioritize goals and tasks
- Allocate necessary resources, budget, staff
- Engage and organize partners

For more information and today's presentation visit  
[propelsavannah.com](http://propelsavannah.com)

For the full Propel Savannah strategic plan  
Email [propelsavannah@seda.org](mailto:propelsavannah@seda.org)