

2021

Comprehensive Economic
Development Strategy (CEDS)



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

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Introduction

i. Regional Planning Commissions

Missouri’s Regional Planning Commissions / Councils of Local Governments

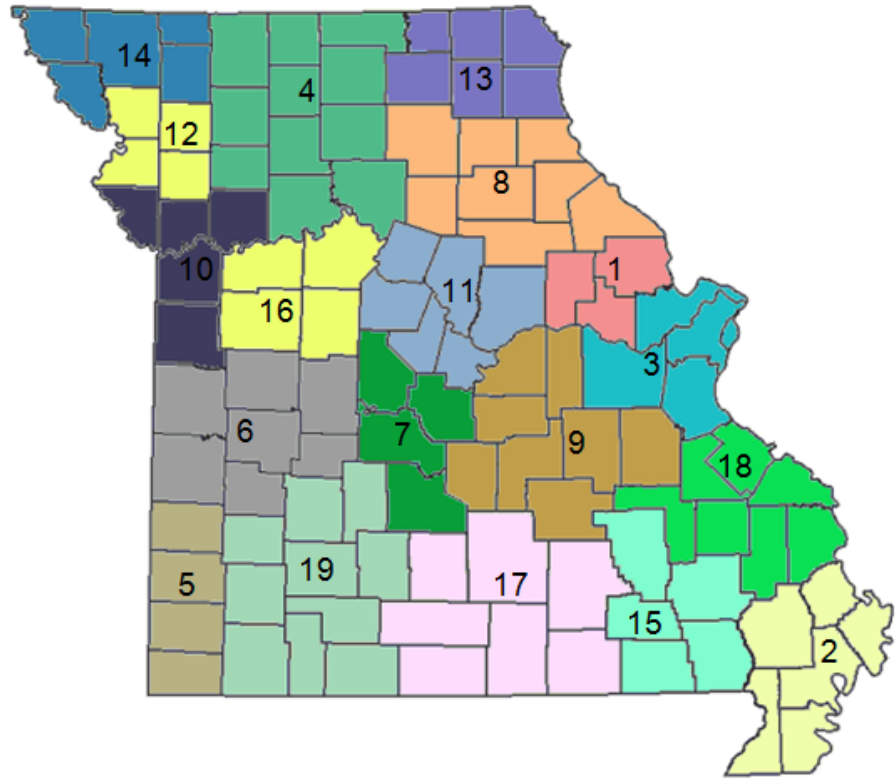
Regional Planning Commissions (RPCs) and Councils of Local Governments (COGs) are organizations of local governments created to provide planning and technical support services to their member local governments.

The statewide network of regional planning commission and councils of local government in Missouri includes 19 RPCs/COGs which have been key partners with the state of Missouri to deliver a variety of programs and services to local jurisdictions since 1966.

While specific activities performed by individual RPCs and COGs across Missouri varies depending on the specific needs of their individual regions, the mission of RPCs/COGs typically lead them to perform activities that can be categorized as community and economic development, transportation, and/or emergency management activities.

Missouri’s RPCs and COGs generate nearly \$1.5 million in local dues, manage more than \$300 million in public funds, and support more than \$165 million in new private investment.

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



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

ii. CEDS Background

The CEDS Process

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

This five-year update began with gathering information that describes current conditions in the region. Numerous federal and state resources were consulted as part of this effort. This CEDS update reflects the most current information available about the region. It is important to note that this five-year CEDS update took place during the COVID-19 pandemic. Every effort was made – where possible – to compare and contrast the pre-COVID-19 and post-COVID-19 economy. It synthesizes data analysis with expert opinions from a diverse set of stakeholders from both the public and private sectors into an economic development strategy for the region.

Mid-MO RPC's Economic Development Advisory Committee (EDAC) served as the Comprehensive Economic Development Strategy Committee for this CEDS update process. EDAC held three CEDS update planning sessions to discuss the CEDS update. The EDAC participated in a SWOC analysis session, assisted with the identification of priority projects, and shared input on updates to the CEDS goals, objectives and strategies, and CEDS action plan. Beyond EDAC meetings, one-on-one meetings were also had with economic development stakeholders in the region to ensure regional needs were not missed during the CEDS process.

The local knowledge assembled through the EDAC allowed for discussion of important regional economic development issues. Data analysis informed the discussions, but it was the local knowledge that participants brought to the table and shared with the group that shaped the CEDS. EDAC is a standing committee that will continue to meet and oversee CEDS implementation.

Benefits of the CEDS

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

The CEDS document—and the planning process that informs it—serves as a guiding document for Mid-MO RPC and our regional planning and economic development efforts. It is critical that we are having continual conversations with regional stakeholders and partners, which is why our organization keeps a standing CEDS committee to keep regional economic development conversations ongoing between CEDS update cycles. Implementation of the strategies identified in the CEDS over the next five years will allow the region to continue positioning itself as a dynamic place for businesses to start, grow and locate and for people to live, work and thrive.

iii. CEDS Executive Summary

The Mid-Missouri economic development environment is in the process of responding to the COVID-19 pandemic and its economic consequences. As the public health impact of the virus begins to recede, the recovery from these economic consequences will continue. The following document provides a broad overview of the current conditions in the six-county region of the Mid-Missouri Regional Planning Commission. It highlights the strengths and weaknesses of the region as seen by a variety of regional stakeholders. It also documents both the broad and specific plans for economic development activities in the region—outlining the economic development vision, goals, objectives, strategies, and priorities.

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

- Creating better jobs and incomes
- Increasing local capacities for development
- Developing and improving infrastructure
- Build on existing regional economic strengths
- Diversifying the regional economy
- Developing new market potentials and business opportunities
- Enhancing quality of life

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

The Regional Economic Base

Higher education and state government serve as the cornerstones of the Mid-Missouri economy. Higher education is the single biggest driver of economic growth and innovation in Mid-Missouri. The University of Missouri—located in Columbia—includes economic development as one of the four pillars of its mission. The university is a driving force behind the region's strength in the bioscience sector and a key partner in establishing a new regional cluster centered on the university's nuclear research reactor. The economic impact of higher education in Mid-Missouri, however, goes well beyond the University of Missouri. In total, there are seven four-year higher education institutions and three two-year public higher education institutions in the six-county region. These higher education institutions serve a valuable role as job training resources for both existing businesses and businesses looking to relocate into the region.

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

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

Regional Strengths, Weaknesses, Opportunities and Challenges (SWOC)

SWOC analysis looks at the strengths, weaknesses, opportunities, and challenges of the region. When analyzing the data and discussing these factors with our planning partners, it becomes clear that while some of the factors identified are universal across the region, it is also clear that what might be a strength in part of the region might be a weakness elsewhere in the region.

Strengths / Opportunities

- Broadband – portions of region are national leaders in fiber-to-the home
- Highway network in the region (I-70, US-54, US-63, US-50)
- Regional airport expansion
- Central location of the region
- Mid-MO is prime location for distribution centers
- Willingness to work regionally
- University of Missouri’s economic development mission including commercializing university research
- Life science / bioscience sector and infrastructure
- Nuclear infrastructure including University of Missouri Research Reactor (MURR) and Callaway Energy Center
- Discovery Ridge Research Park
- Higher education partners in the region (both 2-year and 4-year institutions)
- Entrepreneurship development is a strength that can be built on with additional facilities like more shared office space and commercial kitchen space
- Competitive electric rates
- Quality of life/recreational opportunities
- Low crime rates
- Low cost of living
- Healthcare industry in Boone and Callaway counties
- High economic resilience
- Redevelopment opportunities are abundant

Weaknesses / Challenges

- Broadband access still lacking or insufficient in many parts of the region
- Highway infrastructure condition and funding
- Rail infrastructure - Class 1 rail lines traverse the region but there is a lack of rail spurs and improvements needed to existing short line rail
- Port infrastructure needed to better utilize the Missouri River
- Wastewater infrastructure, especially in small/rural communities
- Private sector employers have identified major needs for workers with specific technical skills especially in the construction trades, health care, information technology, agriculture, and advanced manufacturing sectors
- More public sector training needed, especially as it pertains to law enforcement, water and wastewater operators, and information technology
- Lack of wet lab space
- No space for businesses graduating from MU Life Science Incubator
- Higher education enrollment is down

- Losing talent in the region to larger cities
- Low unemployment rate
- Underemployment
- COVID has revealed supply chain challenges
- Lack of housing and affordable housing
- Lack of child care and affordable child care
- Tourism industry in the region has been hit hard by COVID
- Access to capital a challenge for small businesses and start-ups, especially after the pandemic
- Transit services availability and access
- Entrepreneurship resources stronger in some areas than others
- Women and minority entrepreneurship is a challenge nationally and opportunities within the region targeting these groups need continued support and expansion
- Healthcare access lacking in rural communities
- Downtowns in many communities need funding for revitalization
- Buy local initiatives supporting small businesses could be strengthened
- More shovel ready/certified sites need in the region.
- Lack of funding for small rural economic development organizations
- Lack of secondary processing for value added agriculture
- State government employee pay and employment levels
- Budget cuts for higher education

Regional Goals, Objectives, and Strategies

Regional goals, objectives and strategies were formulated during the CEDS planning process with input from the Economic Development Advisory Committee, Mid-MO RPC membership, and numerous stakeholders from around the region. The goals, objectives and strategies of multiple planning and development organizations operating in the region have also been reviewed in order to discern areas of overlapping interest which may lead to strategic partnerships. The goals, objectives and strategies were designed to capitalize on regional assets and current opportunities and to respond to current and projected conditions in the region.

Goal: Create and retain quality jobs in the region

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

- **Strategy # 1** – Provide linkages between communities/organizations and funding resources.
- **Strategy # 2** – Provide direct technical assistance to communities and organizations.
- **Strategy # 3** – Focus on infrastructure develop through both planning efforts and project development activities, including grant writing and administration.
- **Strategy # 4** – Assist planning partners and other regional organizations with their identified economic development activities including:
 - Cluster development including radiopharmaceuticals, health science and services, life sciences, finance and insurance services, agriculture, logistics and distribution, and tourism.
 - Encourage technology transfer and entrepreneurial incubation and acceleration

- Workforce development initiatives, especially those that focus on technical skills and/or closely incorporate employer-based curriculum
- Entrepreneurship development through technical assistance and increasing access to capital.

Goal: Maintain and develop new infrastructure that will encourage economic development

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

- **Strategy # 1** – Maintain the Mid-Missouri Regional Transportation Plan which identifies and prioritizes transportation projects within the region.
- **Strategy # 2** – Promote and engage in local and regional long-range planning
- **Strategy # 3** – Assist partners with their infrastructure projects and initiatives.
 - Infrastructure that helps create competitive industrial sites
 - Road and bridge infrastructure that increases the capacity of our transportation system, especially in cases where new or expanding businesses drive the need for increased capacity.
 - Encourage multimodal transportation expansion including rail spurs, ports, airports, transit, and pedestrian infrastructure.
 - Workforce development infrastructure
 - Infrastructure at the University of Missouri that promotes economic development including MURR, MU Life Science Business Incubator, Discovery Ridge Research Park, and NextGen Precision Health.
 - Redevelopment of existing regional assets including the former Missouri State Penitentiary, The Loop in Columbia, Kemper Military academy, and others.
 - Downtown revitalization efforts including addressing structurally deficient downtown buildings.
 - Expand housing supply, including housing that would serve the needs of lower- and middle-income individuals and families.
 - Expand access to broadband
 - Encourage environmentally sustainable infrastructure.
- **Strategy # 4** – Provide member communities linkages to information about the latest infrastructure funding and initiatives.
- **Strategy # 5** – Encourage the development of new parks, trails, and other recreational opportunities both as a means to improve quality of life for residents and as potential attractions to encourage tourists and others living outside the region to visit.

Goal: Be competitive and prepared for opportunities

Objective: Ensure that Mid-Missouri communities and regional stakeholders do the planning, engineering, and feasibility study work that allows them to take advantage of and be competitive for opportunities.

- **Strategy # 1** – Provide technical assistance for members and regional entities whether through leading planning efforts (comprehensive plans, economic development strategies, and planning efforts that encourage resiliency), participating in planning processes, or assisting stakeholders acquire funding to conduct planning services.
- **Strategy # 2** – Support and assist planning partners and other regional organizations with their community and economic development goals.
- **Strategy # 3** – Prepare, with the collaboration of the EDAC, a Comprehensive Economic Development Strategy every five years, and review the related work plans annually.

Goal: Entrepreneurship and small business development

Objective: Better leverage current resources and develop additional resources for entrepreneurship and small business development.

- **Strategy # 1** – Encourage the creation of capital investment resources including RLF development in the region.
- **Strategy # 2** – Assist partners in leveraging financing and technical resources for entrepreneurial and economic development activities.
 - Expand business planning and entrepreneurship coaching services
 - Create more spaces where entrepreneurs may share equipment or other resources that would otherwise be financially unfeasible for companies in early stage development, including: shared commercial kitchen space, wet lab space, office space, and more.
 - Support for small local farmers and/or entrepreneurs that utilize local agriculture producers as suppliers for their products or services.

Goal: Create a more economically resilient region

Objective: Increase economic resiliency in the region through planning and technical assistance.

- **Strategy # 1** – Promote and/or facilitate Continuity of Operations Planning (COOP) among communities and businesses in the region.
- **Strategy # 2** – Engage efforts to encourage the mitigation of natural and human-made hazards through both planning initiatives and technical assistance in developing projects that may lead to hazard mitigation.
- **Strategy # 3** – Engage in educational efforts on the need to consider resiliency principles in all planning activities.
- **Strategy # 4** – Support efforts to diversify the regional economy by attracting and developing new industries.
- **Strategy # 5** – Support efforts to strengthen and diversify existing supply chains.

Goal: Create a region with more equity

- **Strategy # 1** – Provide technical assistance to low-to-moderate income communities including providing planning services, project development assistance, and grant writing and administration services.
- **Strategy # 2** – Encourage entrepreneurship development especially among populations that have traditionally been underserved and underrepresented within the entrepreneurship space.
- **Strategy # 3** – Revolving Loan Funding (RLF) development which will provide access to capital to traditionally underserved populations.
- **Strategy # 4** - Support for small local farmers and/or entrepreneurs that utilize local agriculture producers as suppliers for their products or services.
- **Strategy # 5** – Work to expand housing supply, including housing that would serve the needs of lower- and middle-income individuals and families.
- **Strategy # 6** – Work to expand childcare access.
- **Strategy # 7** – Work to increase transit services and expand pedestrian friendly transportation.
- **Strategy # 8** – Expand broadband access in unserved and underserved areas and encourage broadband affordability for low-income individuals and families.

Goal: Create informed communities, citizens, and stakeholders

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

- **Strategy # 1** – Obtain and disseminate information about current opportunities and developmental resources.
- **Strategy # 2** – Plan and facilitate regular meetings of the membership and various committees to review and respond to information about economic activities and opportunities.
- **Strategy # 3** – Keep abreast of “best practices” in regard to economic development by participation in professional organizations and systematically reviewing pertinent literature.
- **Strategy # 4** – Support and assist planning partners and other regional organizations with their identified educational and communication activities.

Goal: Maintain and further develop an efficient and effective regional planning commission

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

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

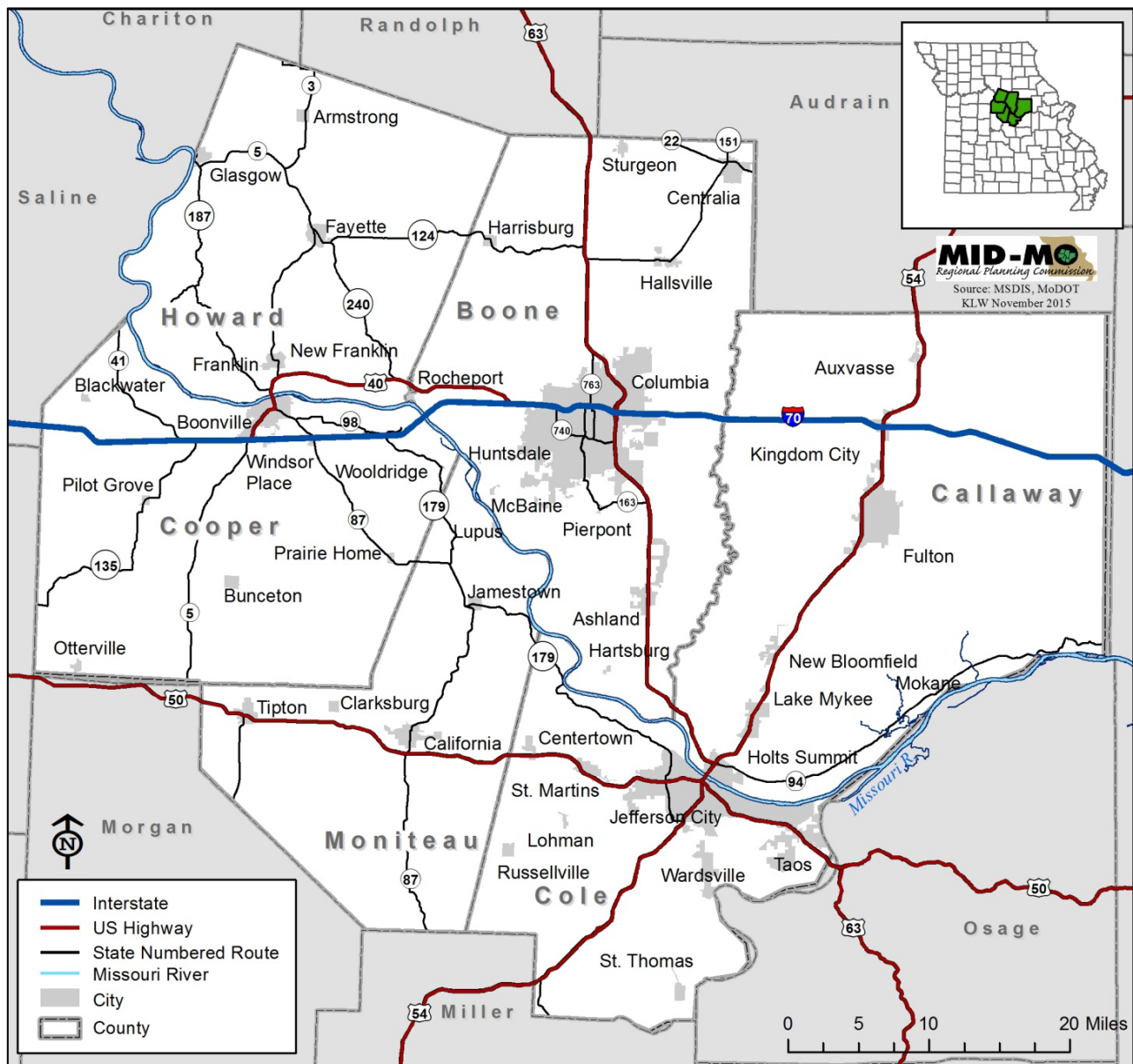
I. The Mid-Missouri Region

A. Regional Overview

The Mid-Missouri (Mid-MO) Region is comprised of six counties in central Missouri, and is located approximately halfway between the major metropolitan areas of St. Louis and Kansas City. The region's largest cities are Columbia – home of the University of Missouri's flagship campus – and Jefferson City – the state capital.

Interstate 70 and the Missouri River run through the heart of the region and – along with other important highways and multiple rail lines – connect the region to the major metros of Missouri and beyond.

Figure 1.0 Mid-Missouri Region



Cities and Counties

The following six counties and forty-three municipalities (listed based on population) comprise the Mid-Missouri Region:

Boone County	Columbia, Centralia, Ashland, Hallsville, Sturgeon, Harrisburg, Rocheport, Hartsburg, Pierpont, Huntsdale, and McBaine
Cole County	Jefferson City, Wardsville, St. Martins, Taos, Russellville, Centertown, St. Thomas, and Lohman
Callaway County	Fulton, Holts Summit, Auxvasse, New Bloomfield, Mokane, and Kingdom City
Cooper County	Boonville, Pilot Grove, Otterville, Bunceton, Windsor Place, Prairie Home, Blackwater, and Wooldridge
Moniteau County	California, Tipton, Jamestown, Clarksburg, and Lupus
Howard County	Fayette, New Franklin, Glasgow, Armstrong, and Franklin

Geography and Land Use

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

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

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

Urban-Rural Classifications

Much has been written on the divide between urban and rural populations across the country; however, we often see drastically different definitions of urban and rural. In 2010, the US Census Bureau laid out common definitions of urban and rural which are discussed here. It should be noted that there is a difference between urban and metropolitan. Metropolitan statistical areas are defined by county; however urban areas are classified based on census blocks. Most counties that are part of metropolitan statistical areas have rural census blocks within them. In fact, in Missouri there are no counties that are 100% urban, the one exception being the independent city of St. Louis.

It should be noted that there are discussions within the federal Office of Management and Budget (OMB) that may change these definitions, which may impact the region. Efforts to change the populations threshold from 50,000 to 100,000 individuals may have a negative impact on Jefferson City, the region's second largest city.

Urban

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

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

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

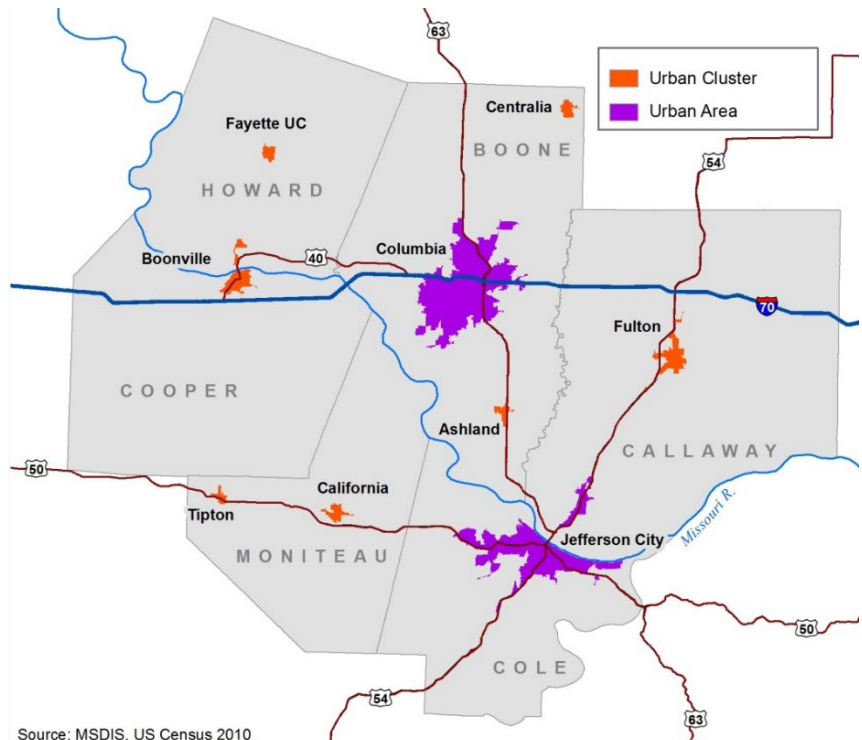
Mid-MO RPC Urban Areas (UAs)

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

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

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

Figure 1.1 Mid-Missouri Urban Areas and Urban Clusters 2010



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

Rural

“Rural” encompasses all population, housing, and territory not included within an urban area. Of the 114 counties in the state, only 33 are classified as being entirely rural and none of these 33 counties are found in Mid-Missouri.

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

Agricultural Land Use

According to the 2017 USDA Census of Agriculture, the number of Mid-Missouri farms increased from 6,425 in 2012 to 6,499 in 2017 while the number of acres of farmland decreased from 1,518,834 to 1,422,106 over that same time.

Figure 1.2 Mid-Missouri Farms, Number and Total Farmland Acreage

County	Number of Farms			Total Farmland (Acres)		
	2017	2012	Change 2007-2012	2017	2012	Change 2007-2012
Boone	1,184	1,171	13	212,732	240,710	-27,978
Callaway	1,438	1,417	21	296,559	316,066	-19,507
Cole	1,169	1,055	114	185,607	176,306	9,301
Cooper	883	928	-45	281,914	307,128	-25,214
Howard	690	765	-75	218,591	243,420	-24,829
Moniteau	1,135	1,089	46	226,703	235,204	-8,501
Mid-MO RPC Region	6,499	6,425	74	1,422,106	1,518,834	-96,728

Source: U.S. Census Bureau, 2017 Census of Agriculture

Figure 1.3 Mid-Missouri Farms, Average Farm Size (Acres)

County	Average Farm Size (Acres)		
	2017	2012	Change 2007-2012
Boone	180	206	-26
Callaway	206	223	-17
Cole	159	167	-8
Cooper	319	331	-12
Howard	317	318	-1
Moniteau	200	216	-16
Missouri	291	285	6

Source: U.S. Census Bureau, 2017 Census of Agriculture

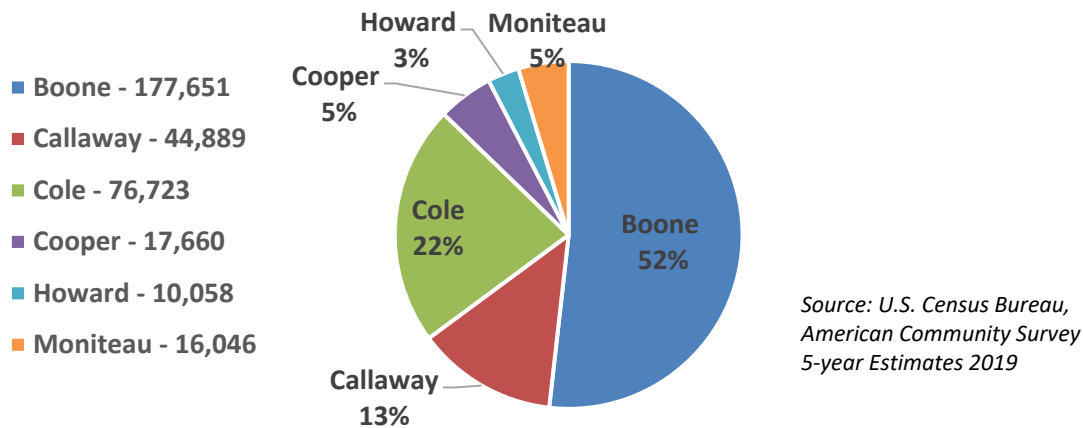
Demographics & Key Statistics

Population

The 2019 American Community Survey conducted by the U.S. Census Bureau estimates that the total population of the Mid-MO RPC Region as 343,027. Columbia (Pop. 121,230) and Jefferson City (Pop. 42,919) are the two most populated cities in the region. The region also has eight other cities with populations ranging from roughly 13,000 to 2,500. These communities are Fulton (Pop. 12,779), Boonville (Pop. 8,418), California (Pop. 4,405), Centralia (Pop. 4,213), Holts Summit (Pop. 4,193), Ashland (Pop. 3,907), Tipton (Pop. 3,372) and Fayette (Pop. 2,693).

Figure 1.4 shows the breakdown of the Mid-MO RPC Region by county. Roughly half of the region’s residents reside in Boone County and nearly three quarters of the population lives in Boone or Cole County.

Figure 1.4 County Population as Percentage of Mid-MO RPC Region



Population Change

Figure 1.5 shows that the 7% population growth in Mid-Missouri between 2010 and 2019 is the same as the 7% population growth rate in the United States and outpaces the 3% population growth rate in Missouri. The population growth in Boone County outpaces national population growth and population growth in Callaway, Cole, and Moniteau counties are consistent with statewide population trends. Population in Cooper County is flat over while population in Howard County has seen a slight decrease.

Figure 1.5 Mid-MO RPC 2010-2019 Population Change

Geography	2010 Population	2019 Population	2010-2019 Pop. Change	2010-2019 Pop. Change %
Boone	158,067	177,651	19,584	12%
Callaway	43,769	44,889	1,120	3%
Cole	74,767	76,723	1,956	3%
Cooper	17,583	17,660	77	0%
Howard	10,120	10,058	-62	-1%
Moniteau	15,468	16,046	578	4%
Mid-MO Region	319,774	343,027	23,253	7%
Missouri	5,922,314	6,104,910	182,596	3%
United States	303,965,272	324,697,795	20,732,523	7%

Source: U.S. Census Bureau, American Community Survey 5-year Estimates 2019

Age

An analysis of median age in the Mid-MO RPC Region shows that most counties in Mid-Missouri have a similar median age to the state, which is slightly higher than the United States. Boone County is the exception. It is one of the five youngest counties in Missouri due to the presence of the University of Missouri.

Figure 1.6 Median Age Comparison

Geography	Median Age
Boone County	31.2
Callaway County	38.6
Cole County	38.6
Cooper County	38.7
Howard County	39.1
Moniteau County	38
Missouri	38.6
United States	38.1

Source: U.S. Census Bureau, American Community Survey 5-year Estimates 2019

Diversity

Figures 1.7 and 1.8 show the racial and ethnic composition of Mid-Missouri based on 2019 American Community Survey five-year estimates.

The racial composition of Mid-Missouri is predominately white. The region as a whole and each individual county has a higher percentage of white residents than the United States and five of the six counties in the region have a higher percentage of white residents than the Missouri, Boone County being the only exception. Cole and Boone Counties have the highest percentage of African Americans in the region. Nationally, African Americans comprise 12.7% of the population while they represent just 8.4% of Mid-Missouri. This includes 11.7% of Cole County and 9% of Boone County.

The Asian population of the region is largely concentrated in Boone County where it represents 4.4% of the county's population. This is more than twice percentage found throughout the state of Missouri as a whole which is only 2% Asian.

The Hispanic population in Mid-Missouri is a much smaller percentage of the population than the nation as a whole and lower even than the state of Missouri. National Hispanic or Latino individuals make up 18% of the population, while they only make up 3.1% of Mid-Missouri residents. Moniteau County has the largest percentage of its population identifying as Hispanic or Latino at 4.9%.

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

Figure 1.7 Race and Hispanic Ethnicity Comparison

	Mid-MO Region		Missouri		United States	
White	290,245	84.6%	5,015,904	82.2%	235,377,662	72.5%
Black or African American	28,971	8.4%	701,334	11.5%	41,234,642	12.7%
Native American and Alaskan Native	1,378	0.4%	27,084	0.4%	2,750,143	0.8%
Asian	9,565	2.8%	120,654	2.0%	17,924,209	5.5%
Native Hawaiian and Pacific Islander	354	0.1%	8,231	0.1%	599,868	0.2%
One Race (Some other Race)	2,071	0.6%	71,335	1.2%	16,047,369	4.9%
Two or more races	10,443	3.0%	160,368	2.6%	10,763,902	3.3%
Hispanic or Latino	10,494	3.1%	254,791	4.2%	58,479,370	18.0%

Source: US Census Bureau, American Community Survey, 5-year Estimates 2019

Table 1.8 Race & Hispanic Ethnicity in Mid-MO RPC Region by County

	Boone		Callaway		Cole		Cooper		Howard		Moniteau	
White	144,228	81.2%	41,309	92.0%	64,416	84.0%	15,675	88.8%	9,214	91.6%	15,403	96.0%
Black or African Amer.	15,952	9.0%	1,969	4.4%	8,985	11.7%	1,029	5.8%	598	5.9%	438	2.7%
Native Amer. & Alaskan Native	600	0.3%	243	0.5%	301	0.4%	86	0.5%	86	0.9%	62	0.4%
Asian	7,880	4.4%	366	0.8%	1,194	1.6%	80	0.5%	36	0.4%	9	0.1%
Native Hawaiian & Pacific Islander	162	0.1%	148	0.3%	11	0.0%	33	0.2%	0	0.0%	0	0.0%
One Race (Some other Race)	1,681	0.9%	26	0.1%	184	0.2%	112	0.6%	37	0.4%	31	0.2%
Two or more races	7,148	4.0%	828	1.8%	1,632	2.1%	645	3.7%	87	0.9%	103	0.6%
Hispanic or Latino	6,086	3.4%	940	2.1%	2,176	2.8%	352	2.0%	158	1.6%	782	4.9%

Source: US Census Bureau, American Community Survey, 5-year Estimates 2019

Labor Force Size

Figure 1.9 depicts the size of Mid-Missouri labor force both currently and prior to the COVID-19 pandemic. The current labor force size is slightly less (0.34% less) than it was in 2019 before the pandemic.

Figure 1.9 Mid-MO RPC Regional Labor Force Size

County	February 2021	2019 Average
Boone	97,573	98,300
Callaway	21,476	21,383
Cole	39,346	39,051
Cooper	7,168	7,481
Howard	4,898	4,898
Moniteau	7,360	7,313
Mid-MO Region	177,821	178,426

Source: Missouri Economic Research and Information Center (MERIC); U.S. Bureau of Labor Statistics (BLS)

Educational Attainment

Mid-Missouri has a highly educated workforce. Figure X shows that in Boone County -- where half of the Mid-Missouri workforce resides -- 46.1% of the population has a bachelor's degree or higher compared to the country as a whole with only 32.1% reaching this mark. Cole County, with the region's second highest population, also has a higher than the national average rate of college graduates.

Figure 1.10 Regional Educational Attainment

	Boone	Callaway	Cole	Cooper	Howard	Moniteau	Missouri	U.S.
Less than 9th grade	1.9%	3.8%	2.4%	3.0%	3.8%	7.0%	3.1%	5.1%
9th to 12th Grade	3.5%	10.0%	5.3%	8.3%	8.3%	7.7%	6.9%	6.9%
High school graduate (including equivalency)	21.3%	36.1%	29.7%	37.5%	37.1%	40.1%	30.6%	27.0%
Some college, no degree	19.8%	19.5%	21.6%	20.6%	19.1%	18.9%	22.2%	20.4%
Associate's degree	7.3%	7.5%	7.7%	8.4%	6.5%	5.9%	7.9%	8.5%
Bachelor's degree	26.1%	15.4%	21.5%	15.2%	14.8%	15.0%	18.0%	19.8%
Graduate or professional degree	19.9%	7.7%	11.8%	6.9%	10.3%	5.5%	11.2%	12.4%
High school or higher	94.5%	86.2%	92.3%	88.7%	87.9%	85.4%	89.9%	88.0%
Bachelor's degree or higher	46.1%	23.1%	33.3%	22.1%	25.2%	20.5%	29.2%	32.1%

Source: US Census Bureau, American Community Survey, 5-year Estimates 2019

Wages

Minimum Wage

Minimum Wage in Missouri is \$10.30 per hour. The Missouri minimum wage will increase 85 cents per hour each year through 2023. This is higher than the federal minimum wage of \$7.25 per hour. No city in the Mid-Missouri Region has a minimum wage exceeding the state minimum wage.

Figure 1.11 Minimum Wage

Federal	\$7.25
Missouri	\$10.30

Source: U.S. Department of Labor; Missouri Department of Labor and Industrial Relations

Average Wages

In Mid-Missouri, average annual wages and average hourly wages in the private sector vary from county to county but each county in the region has lower average wages than the statewide average as shown in Figure 1.11.

Figure 1.11 Average Wages for Private Industry, 2019

County	Avg Annual Wages	Avg Hourly Wages
Boone	\$42,346	\$20.36
Callaway	\$48,100	\$23.13
Cole	\$42,380	\$20.38
Cooper	\$33,394	\$16.05
Howard	\$31,840	\$15.31
Moniteau	\$37,155	\$17.86
Statewide (MO)	\$51,134	\$24.58

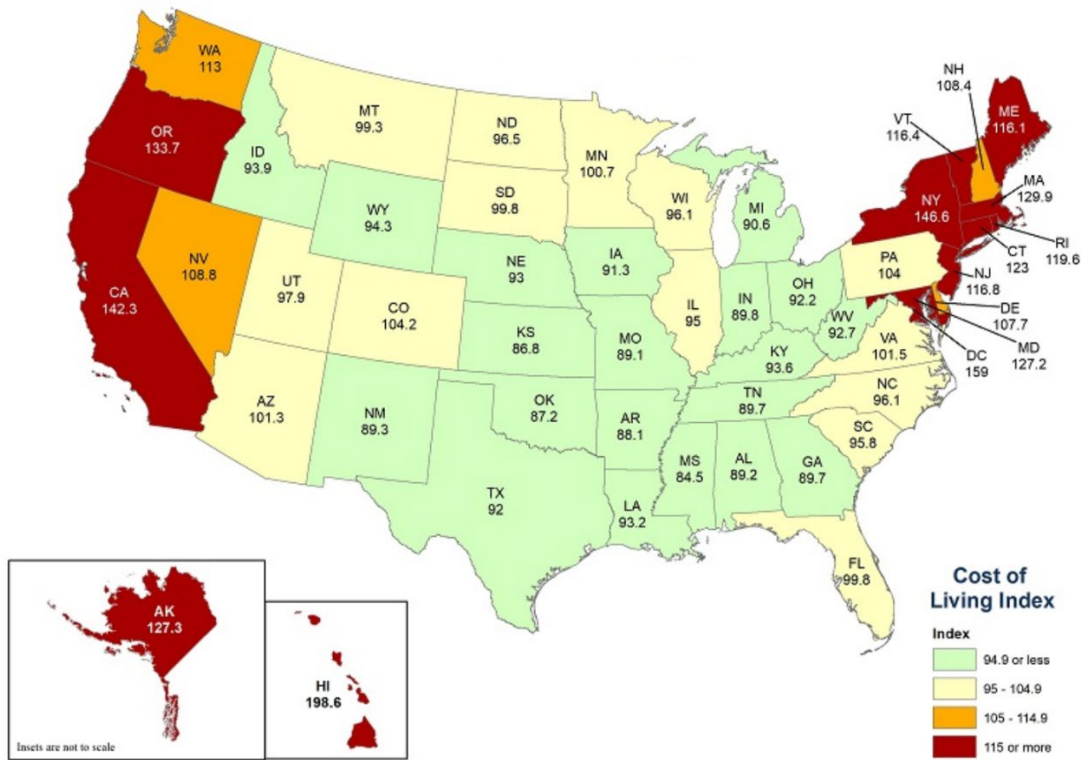
Source: Missouri Economic Research and Information Center (MERIC), 2019 Total Wages for All Industries Private Ownership, derived from U.S. Bureau of Labor Statistics (BLS), Quarterly Census of Employment and Wages

Cost of Living

Cost of living is an important factor to consider when considering quality of life. In areas with lower wages, those wages earned will go further in an area with a lower cost of living. Lower cost of living will be of interest to companies looking at relocating or expanding to a new region and is an important factor for attracting retirees to a region. Council for Community and Economic Research's (C2ER) Cost of Living Index (COLI) has become an industry standard that is recognized by the U.S. Census Bureau, US Bureau of Labor Statistics, and the President's Council of Economic Advisors.

Missouri had the 5th lowest cost of living in the United States in 2020 and has been a top ten lowest cost of living state for the last four years.

Figure 1.12 Composite Cost of Living Index – 2020 Annual Average, by State



Source: Missouri Economic Research and Information Center (MERIC), derived from Council for Community and Economic Research (C2ER) Cost of Living Index (COLI), 2020 Annual Averages

COLI data is only available for a limited number of Metropolitan Statistical Areas (MSAs), and in the Mid-Missouri Region data is only available for the Columbia MSA and Jefferson City MSA. Figure 1.13 shows Columbia and Jefferson City to have a significantly lower cost of living than the national average. Lower housing prices in Mid-Missouri and statewide look to be the largest single driver for the lower cost of living when compared to the national average.

Figure 1.13 Cost of Living Indices for Participating Missouri Cities - Annual Average 2020

Metro	Index	Grocery	Housing	Utilities	Transport	Health	Misc.
Joplin MO	81.2	89.4	59.6	104.3	89.5	92.7	85.4
St. Louis MO-IL	88	101.5	71.3	96.5	89.4	89.1	93
Springfield MO	88.6	101.5	72.4	86.6	89.3	101.2	94.9
Missouri	89.1	97.1	73.7	96.6	91.8	96.9	94.4
Jefferson City MO	89.2	97.6	72.8	95.8	100.8	98.8	92.9
Columbia MO	92.4	98.9	78.2	98.3	89.2	98.6	99.5
Kansas City MO-KS	95.2	93.8	87.6	98.2	92.7	100.7	100.8
US Average	100	100	100	100	100	100	100

Source: Missouri Economic Research and Information Center (MERIC), derived from Council for Community and Economic Research (C2ER) Cost of Living Index (COLI), 2020 Annual Averages

Poverty

According to the Small Area Income and Poverty Estimates produced by the U.S. Census Bureau, poverty rates in Mid-MO RPC Region tend to be near or below the national average with Boone County being the major exception. Boone County’s poverty rate in 2019 was 17.2% which is roughly 5% higher than the national average.

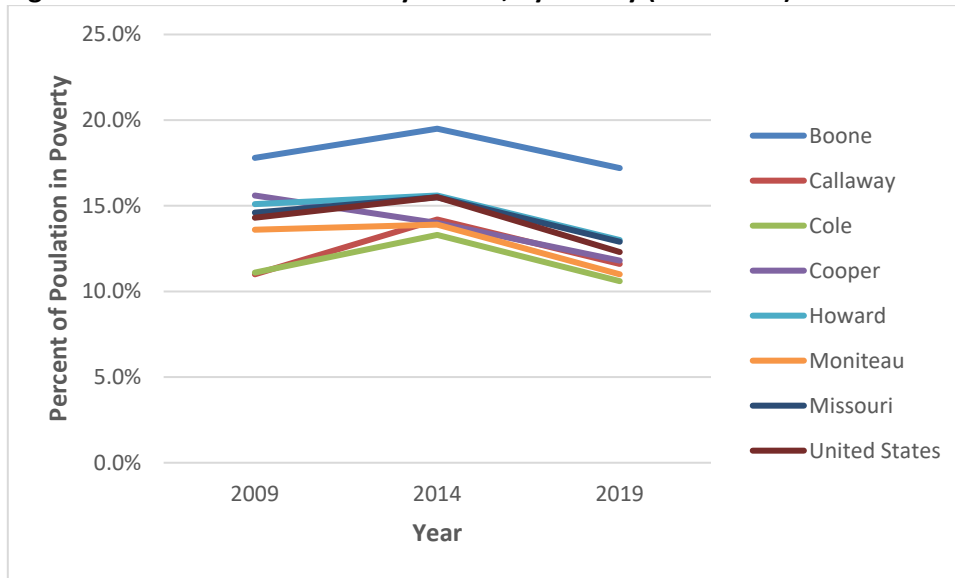
As shown in Figures 1.14 and 1.15, poverty rates across the region have largely mirrored the decline in national and statewide poverty rates between 2014 and 2019.

Figure 1.14 Percent of Population Living in Poverty

Year	Boone	Callaway	Cole	Cooper	Howard	Moniteau	Missouri	United States
2009	17.8%	11.0%	11.1%	15.6%	15.1%	13.6%	14.6%	14.3%
2014	19.5%	14.2%	13.3%	14.0%	15.6%	13.9%	15.5%	15.5%
2019	17.2%	11.6%	10.6%	11.8%	13.0%	11.0%	12.9%	12.3%

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

Figure 1.15 Mid-Missouri Poverty Trends, by County (2009-2019)



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

Figure 1.16 shows that Boone County also exceeds the national average in terms of the numbers of residents living well below the poverty line. Almost 1 in 10 Boone County residents (9.7%) live at 50% or below the poverty level. The national average is 6% of the population living at 50% or below the poverty rate and each of the other counties in the Mid-Missouri region are below that 6% rate.

Figure 1.16 Percent of Population Living at 50% of Poverty Line or Less

Year	Boone	Callaway	Cole	Cooper	Howard	Moniteau	Missouri	U.S.
2014	11.2%	6.3%	5.8%	4.9%	7.2%	4.1%	6.8%	6.9%
2019	9.7%	5.5%	5.6%	5.6%	5.9%	3.9%	5.9%	6.0%

Source: USDC, Bureau of the Census, American Community Survey 5-year Estimates, 2014-2019

Recreation & Tourism

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

Outdoor Recreation

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

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

Cultural Activities

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

True / False and Citizen Jane are two documentary film festivals in Columbia that have increasingly gathered national and even international recognition. The True / False film festival, in particular, brings in visitors from around the country with attendance consistently toping 50,000 people in the years prior to COVID. In March 2020, True / False attendance was down roughly 10% compared to the previous year and significant changes – such as outdoor viewing pushing the event back until May – were put in place to respond to COVID.

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

Sports and Gaming

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

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

Boonville is a community whose economy places a strong emphasis on tourism. The Isle of Capri Casino and Hotel in Boonville is the community's largest employer with over 700 employees prior to COVID-19. Warm Springs Ranch, located just outside of Boonville, is a breeding farm for the Budweiser Clydesdales and provides visitors with tours from March to November which are popular tour bus destination. The City of Boonville has also invested in a major soccer complex designed to attract youth soccer tournaments to the area.

Jefferson City is in the process of redeveloping the site historic Missouri State Penitentiary which draws visitors from around the country. The site will be the home of a new hotel and convention center, and future plans include a possible regionally significant ice arena that may be used to bring hockey tournaments to the region. There have also been discussion in recent years about working to attract a minor league baseball team to Jefferson City.

Wineries and Microbreweries

Missouri has a thriving wine industry with more than 130 wineries, 425 grape growers, and more than 1,700 acres of grapes. The wine industry in Missouri has \$3.2 billion in economic impact annually, with more than 28,000 jobs supported, resulting in \$1 billion in wages for Missourians. In central Missouri, the Missouri River Wine Trail is home to seven wineries, several of which are in the Mid-MO RPC Region.

Nation trends show that craft beer sales are increasing at a dramatic rate. According to the most recent Brewers Association economic impact data, Missouri ranks 20th in the country for the number of craft breweries. Additionally, the craft beer industry provides 9,867 jobs for Missourians, paying an average wage of \$40,347. Missouri craft brewers produced 363,383 barrels of beer in 2019 and have an economic impact of more than \$1.2 billion.

In Mid-Missouri, as well as around the country, wineries and microbreweries are often community gathering places that bring quality of life value to a community.

B. Regional Economy

A regional economy can only be understood by analyzing a variety of factors. In this document, the Mid-Missouri Comprehensive Economic Development Strategy (CEDS) begins with overview of the key sectors within the regional economy, transitions into a discussion of the economic distress that exists within the region, includes a discussion on entrepreneurship in the region, and then dives into an overview of discussions with major employers in the region about the skills gaps they see in the regional workforce. This multi-prong approach to portraying our region economy includes both hard data combined with summaries of real-world discussions with regional stakeholders in an effort to give a holistic understanding of the Mid-Missouri economy.

Economic Base

Higher education, state government, and healthcare are the largest employers in the Mid-Missouri region and serve as the cornerstones of the Mid-Missouri economy. Other key industries include manufacturing, finance and insurance, food processing, nuclear sector, and agriculture.

Higher Education

Higher education is the single biggest driver of economic growth in Mid-Missouri. Columbia is home to the **University of Missouri**, the state of Missouri's flagship university. University of Missouri-Columbia (MU) students represent every Missouri county, all 50 states and 120 countries. The state's largest university, it is one of only six public universities nationwide with a medical school, college of veterinary medicine and law school on the same campus. It also has a renowned journalism school and the largest nuclear research reactor in the country.

In November 2017, Tripp Umbach – a nationally recognized consulting firm – was retained by UM System to provide comprehensive analysis on the economic, employment and government revenues that arise from UM System operations and expenditures. The study quantifies the influence that the UM System and the University of Missouri-Columbia (MU) have on the vitality of the economy within Mid-Missouri and the state. This economic influence includes business volume impacts (capital expenditures, operational expenditures, salary data and state and regional business volumes); direct and indirect/induced employment; government revenue at the local and state levels; spending by employees and students in the local economy on goods and services; and visitor spending on the economy (wage premiums, job creation and etc.).

The Tripp Umbach study found that in FY17, MU generated more than \$3.9 billion in economic impact for the state, which represents direct spending in Missouri (\$1.6B) and indirect spending that occurred as a result of the presence of MU (\$2.3B). It also supported 28,687 full-time and part-time jobs throughout the state, and campus spending supported additional indirect jobs. In total, the presence of MU supported 46,855 jobs in Missouri. MU's \$117.4 million total for in-state and local tax revenue reflects direct and indirect/induced tax payments in the state.

In Mid-Missouri, the economic impact of higher education goes well beyond the University of Missouri. As shown in Figure X.XX, Mid-Missouri is home to several four-year colleges and universities. State Technical College of Missouri – which has a statewide mission – is located just outside of the Mid-MO RPC region. Two community colleges have main campuses just outside of our region and serve the region with satellite campuses. Through the support of EDA, Mid-Missouri will also be home to a new Ranken Technical College campus in Ashland.

Figure 2.0 also shows the decline in enrollment in our four-year higher education institutions over the last four years. Enrollment in State Technical College of Missouri is the only higher education institution in or near Mid-Missouri that has seen a sharp increase in enrollment over the past five years. State Technical College is an asset to the region, but more technical training is needed in the region. The sharp increase in enrollment at State Tech. has demonstrated this desire for technical training, which is one reason having another technical school in the heart of the region like Ranken Tech. is vital to the economic vitality of the region.

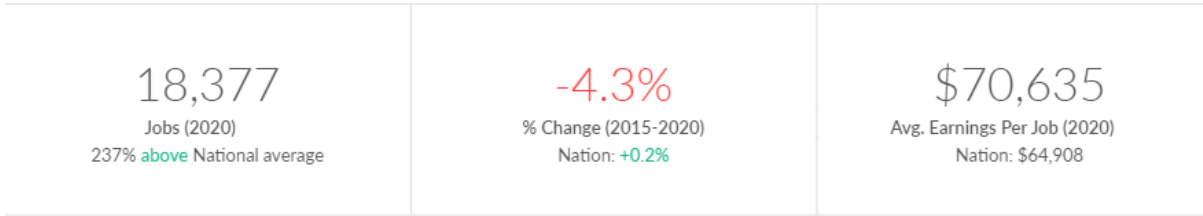
Figure 2.0 Enrollment Trends at Educational Institutions Located In or Near Mid-MO Region, Fall 2015-20

Type	Educational Institution	Annual Enrollment						Enrollment Trends		
		2015	2016	2017	2018	2019	2020	1-year Change	3-year Change	5-year Change
Four-Year Institutions	University of Missouri-Columbia	35,424	33,239	30,844	29,843	30,014	31,089	3.6%	0.8%	-12.2%
	Lincoln University	2,945	2,738	2,619	2,478	2,436	2,012	-17.4%	-23.2%	-31.7%
	Columbia College	14,771	16,430	13,504	12,097	9,920	8,347	-15.9%	-38.2%	-43.5%
	Stephens College	893	949	862	756	661	622	-5.9%	-27.8%	-30.3%
	Westminster College	930	856	767	717	658	609	-7.4%	-20.6%	-34.5%
	William Woods University	2,172	2,076	2,212	2,240	2,153	2,109	-2.0%	-4.7%	-2.9%
	Central Methodist University - CLAS	1,094	1,093	1,060	1,148	1,145	1,141	-0.3%	7.6%	4.3%
Two-Year Public Institutions	State Technical College	1,274	1,227	1,256	1,471	1,724	1,927	11.8%	53.4%	51.3%
	Moberly Area Community College	4,823	5,004	4,865	5,174	4,834	4,862	0.6%	-0.1%	0.8%
	State Fair Community College	4,926	5,138	4,786	4,728	4,284	3,927	-8.3%	-17.9%	-20.3%

Source: Missouri Department of Higher Education

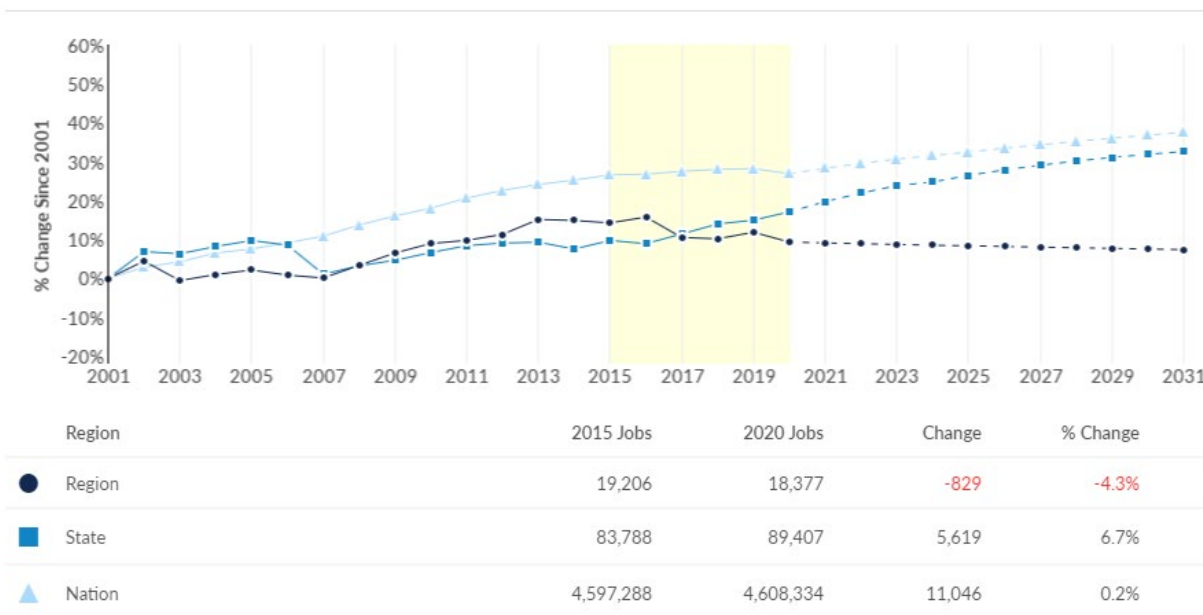
Federal employment data demonstrates how important higher education employment is to the region with over 18,000 jobs in the higher education sector regionally; however, lower enrollment numbers and less state support for higher education in recent years has resulted in a decrease in higher education related employment as demonstrated in figures 2.1 and 2.2. The region has experienced a 4.3% reduction in higher education employment over the last five years. If that trend were to continue, it would be a blow to our regional economy that is not easily made up for elsewhere.

Figure 2.1 College, University, and Profession Schools Employment Figures 2015-2020



Source: EMSI, Industry Snapshot Report, April 2021

Figure 2.2 College, University, and Professional Schools Employment Trends and Projections



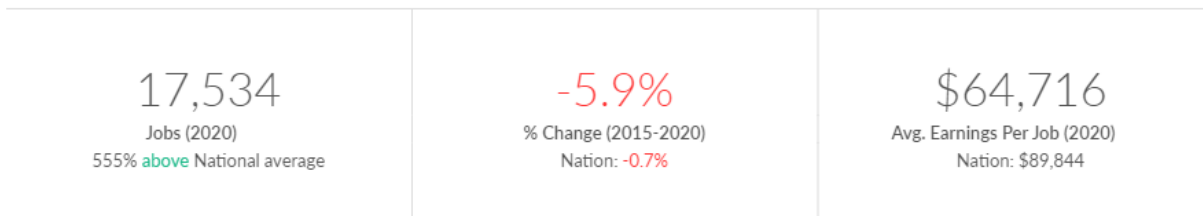
Source: EMSI, Industry Snapshot Report, April 2021

State Government

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

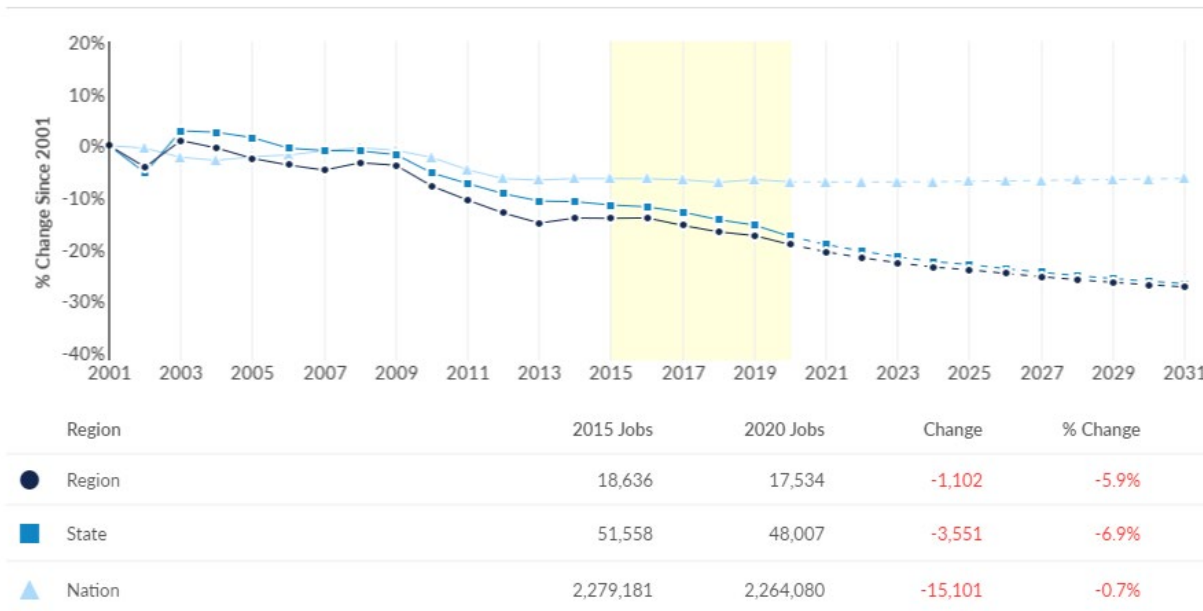
Economies that are heavily reliant on the government sector tend to be relatively stable and weather economic downturns relatively well; however, while state government may help prevent the region from being as susceptible to large economic shocks, state employment practices have also not contributed to any kind of economic boost for the region in recent years. The State of Missouri has steadily reduced its workforce over the last 15 years. State of Missouri employees are also the lowest paid state employees in the country.

Figure 2.3 State Government Employment Figures 2015-2020



Source: EMSI, Industry Snapshot Report, April 2021

Figure 2.4 State Government Employment Trends and Projections



Source: EMSI, Industry Snapshot Report, April 2021

Healthcare

The healthcare industry is the third largest employer in the region behind state government and the University of Missouri. The region is home to six hospitals and numerous physicians' offices and outpatient clinics. Both the quantity and quality of healthcare jobs has been important to the region. These facilities offer a variety of opportunities for both college-educated employees and individuals earning certifications or degrees at less than a bachelor's level of education.

The healthcare providers in our region continue to have a long list of workforce development needs. Outreach to one local hospital to discuss workforce development needs as part of a recent curriculum development exercise for the new Ranken Technical College coming to Mid-Missouri, resulted in a list of healthcare related workforce needs larger than the planned 21,000 square feet Ranken Technical College facility could accommodate without further expansion.

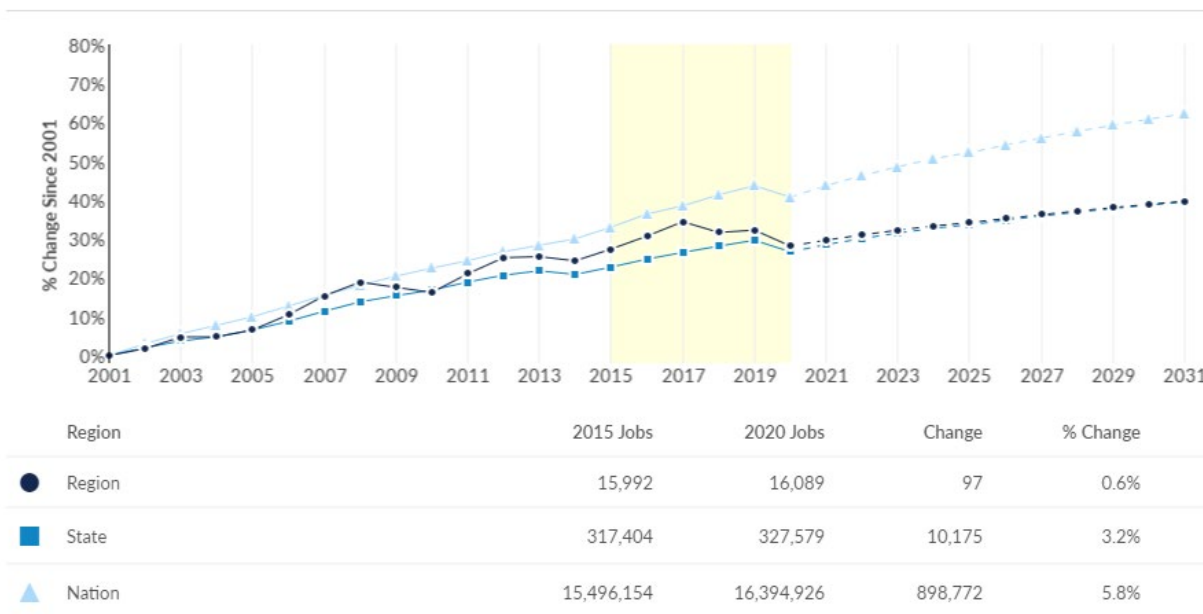
It must be noted that the region has seen a divide between the success of its more urban and rural hospitals. Hospitals in Columbia and Jefferson City have expanded in recent years, while the hospital in Boonville recently closed and the hospital in Fulton nearly closed four years ago. Access to hospitals and quality healthcare is vital to the economic development opportunities of our rural communities.

Figure 2.5 Healthcare Employment Figures 2015-2020



Source: EMSI, Industry Snapshot Report, NAICS 621, 622,623, April 2021

Figure 2.6 Healthcare Employment Trends and Projections



Source: EMSI, Industry Snapshot Report, NAICS 621, 622,623, April 2021

Manufacturing

Manufacturing is an integral component of the Mid-Missouri economy. International companies like 3M, ABB, Caterpillar, Unilever, Hubbell Power Systems, and others all have manufacturing facilities in the region. Whether it is healthcare products at 3M, electric transformers at ABB, heavy machinery parts at Caterpillar, consumer soap products at Unilever, or earth anchors at Hubbell, manufacturing jobs are a vital component of our regional economy. The region has more than 10,000 manufacturing jobs which on average pay more than \$67,000 per year.

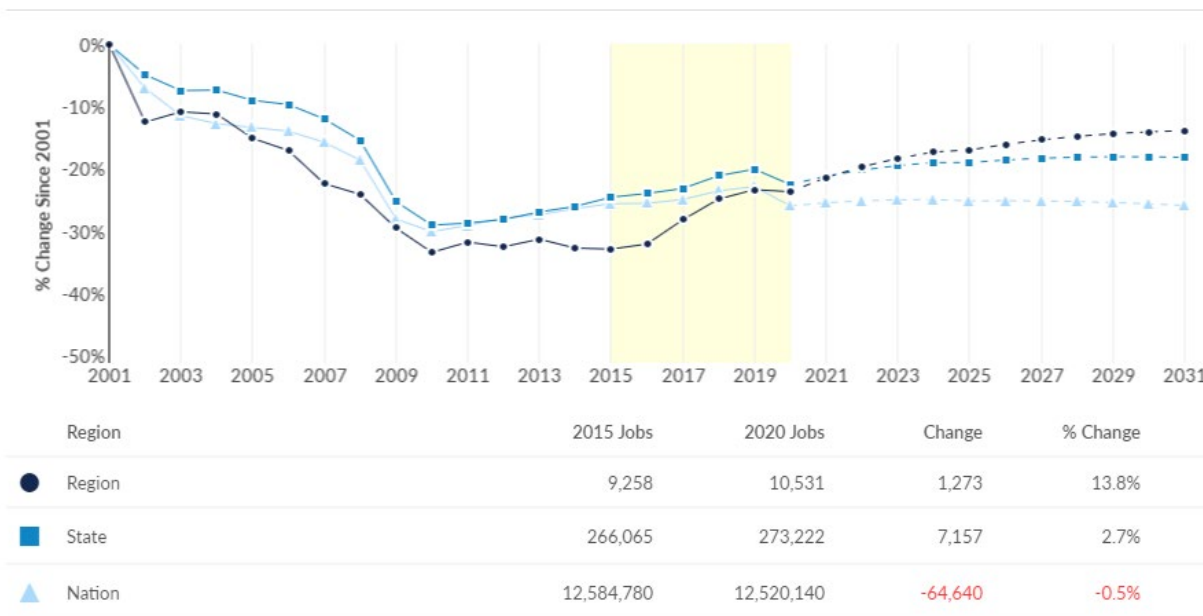
Figures 2.7 and 2.8 show that while the nation has seen declining manufacturing jobs numbers over the last five years, Mid-Missouri has seen a 13.8% increase in manufacturing jobs over that time. EMSI projects that over the next 10 years Mid-Missouri will see a growth in manufacturing jobs while the nation is projected to see manufacturing employment remain largely flat over that time. This suggests that Mid-Missouri is and will be a more attractive location for manufacturers to locate over the next decade.

Figure 2.7 Manufacturing Employment Figures 2015-2020



Source: EMSI, Industry Snapshot Report, April 2021

Figure 2.8 Manufacturing Employment Trends and Projections



Source: EMSI, Industry Snapshot Report, April 2021

Finance and Insurance

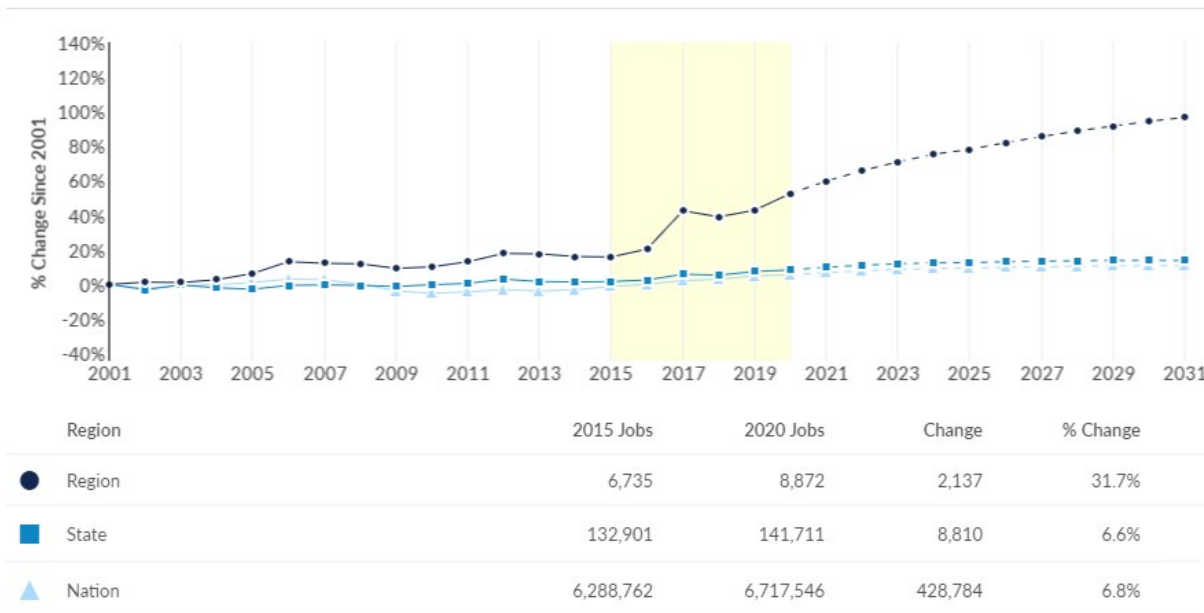
Financial and insurance is one of the fastest growing sectors in the Mid-Missouri Region. The sector employs 8,872 people, and between 2015 and 2020 jobs in finance and insurance increased by 31.7%. Companies like Veterans United, Shelter Insurance, Farm Bureau, and Central Bancompany all have a major presence in Mid-Missouri. From a workforce development perspective, information technology (IT) has been identified as a major need for the finance and insurance sector in the region.

Figure 2.9 Finance and Insurance Employment Figures 2015-2020



Source: EMSI, Industry Snapshot Report, April 2021

Figure 2.10 Finance and Insurance Employment Trends and Projections



Source: EMSI, Industry Snapshot Report, April 2021

Nuclear Sector

Nuclear reactors in Boone and Callaway counties are pivotal but very different roles in Mid-Missouri’s regional economy.

The Callaway County Energy Center located just south of Fulton is a 1,360 MW facility owned and operated by Ameren Missouri. It is Missouri's only commercially nuclear unit. In previous years there have been discussion about building a second reactor at Callaway Energy Center or constructing Small Modular Reactors (SMRs) on site, but neither of these projects has materialized to date. The Ameren reactor is one of the region’s largest single employers.

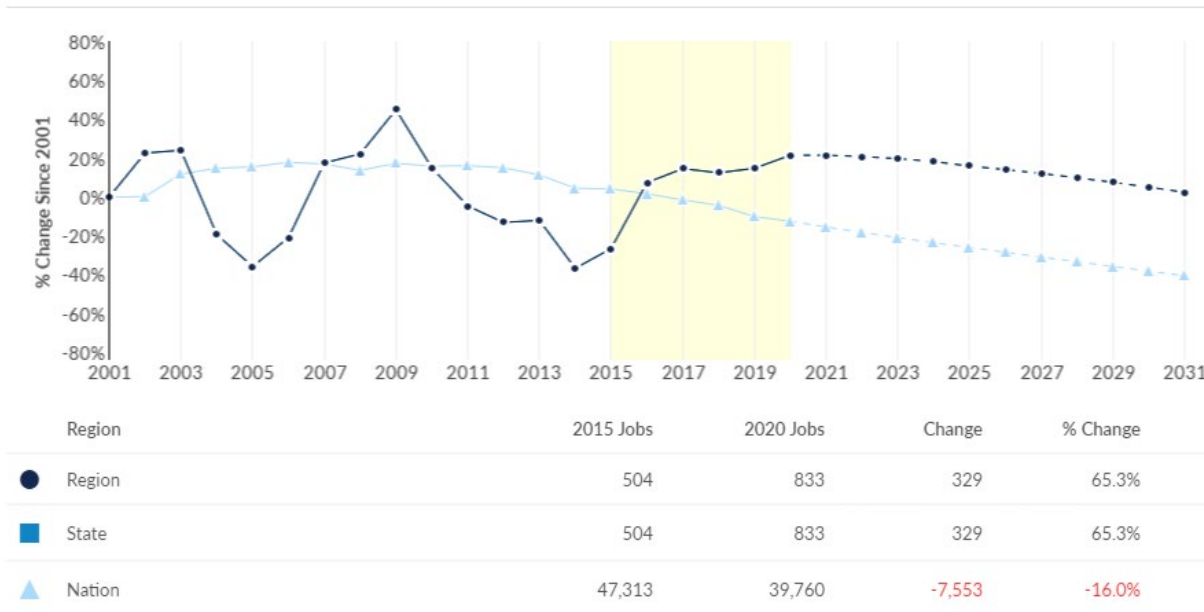
The 10 MW University of Missouri Research Reactor (MURR) in Columbia is small from a power generation perspective but has the potential to be a large economic development asset for the region. MURR is the largest university research reactor in the country and is a vital piece of infrastructure encouraging a potential cluster of nuclear sector related businesses. MURR has draw interest from several companies that see it as a unique asset that has the ability to service private sector needs in a way that a large nuclear power generation reactor, like the reactor at the Callaway Energy Center, cannot serve.

Figure 2.11 Nuclear Power Generation Employment Figures 2015-2020



Source: EMSI, Industry Snapshot Report, April 2021

Figure 2.12 Nuclear Power Generation Employment Trends and Projections



Source: EMSI, Industry Snapshot Report, April 2021

Agribusiness

Agribusiness is a target industry group for the state of Missouri, and it is an important part of Mid-Missouri’s regional economy. Agribusiness includes crop and animal production, agriculture support activities, animal slaughtering and processing, dairy product manufacturing, and more.

From 2015 to 2020, agribusiness employment in Mid-Missouri increased 8.7% while it was largely flat in Missouri and across the nation as a whole. Mid-Missouri’s employment growth in Agribusiness is anticipated to continue at well above the state and national growth rate over the next 10 years.

Figure 2.13 Agriculture Employment Figures 2015-2020



Source: EMSI, Industry Snapshot Report, NAICS 1110, 1120, 1131, 1132, 1133, 1141, 1142, 1151, 1152, 1153, 3112, 3114, 3115, 3116, 3253, April 2021

Figure 2.14 Agriculture Employment Trends and Projections

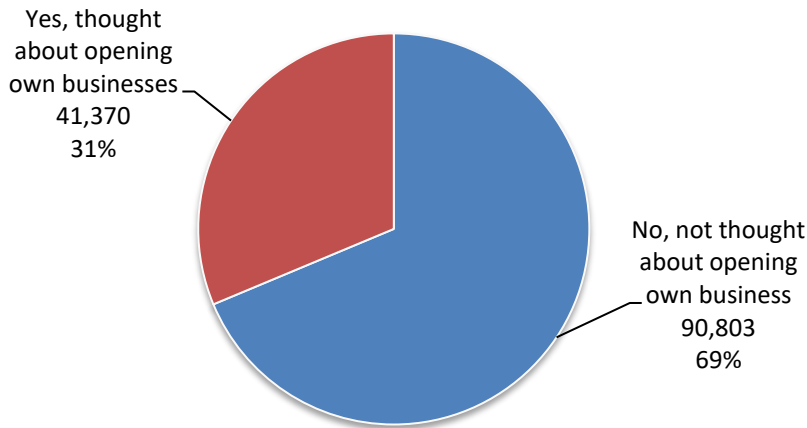


Source: EMSI, Industry Snapshot Report, NAICS 1110, 1120, 1131, 1132, 1133, 1141, 1142, 1151, 1152, 1153, 3112, 3114, 3115, 3116, 3253, April 2021

Entrepreneurship

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

Figure 2.15 Potential Entrepreneurs



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

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

Figure 2.16 Highest Level of Education Achieved Among Potential Entrepreneurs

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

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

Economic Distress

In order to be eligible for many EDA funding opportunities, applicants must propose a project that meets EDA’s distress criteria. These distress criteria are traditionally based on either per capita income or unemployment rate, however, EDA typically also includes several “special need” criteria which may apply to Mid-Missouri. Of these special need criteria, Opportunity Zones and underemployment deserves special attention in Mid-Missouri.

Per Capita Income

In Mid-Missouri, four of the six counties in the region are considered distressed based on American Community Survey 5-year estimates of per capita income and BEA estimates of per capita income as documented in Figure 2.18. The region as a whole is not considered distressed based on per capita income, as shown in Figure 2.17, due to Boone and Cole county’s higher income levels and their larger populations which impact the region-wide numbers.

Figure 2.17 Regional Distress Based on Per Capita Income

	Region	U.S.	Threshold Calculations
2019 Per Capita Money Income (5-year ACS)	\$29,002	\$34,103	85.04%
2019 Per Capita Personal Income (BEA)	\$46,070	\$56,490	81.55%

Figure 2.18 County Distress Based on Per capita Income

	ACS 5-Year PCMI	Threshold Calculation	BEA PCPI	Threshold Calculation
Boone	\$30,415	89.2%	\$48,525	85.9%
Callaway	\$25,849	75.8%	\$39,111	69.2%
Cole	\$30,422	89.2%	\$48,273	85.5%
Cooper	\$23,961	70.3%	\$40,212	71.2%
Howard	\$23,753	69.7%	\$41,534	73.5%
Moniteau	\$24,224	71.0%	\$36,675	64.9%

Unemployment Rate

Unemployment rates in Mid-Missouri are generally lower than national unemployment rates. This is true for region-wide unemployment rates as well as individual county unemployment rates.

Figure 2.19 Regional and National Unemployment Rates and Threshold Calculations

	Region	U.S.	Threshold Calculations
24-month Average Unemployment Rate (BLS) - Period Ending January 2021	3.48%	5.94%	-2.46

Source: Distress Criteria Statistical Report (05/2021), StatsAmerica, Indiana Business Research Center, Indiana University

Figure 2.20 County Unemployment Rates and Threshold Calculations

	24 Month Unemployment Rate	Threshold Calculation
Boone	3.3%	-2.64
Callaway	3.73%	-2.21
Cole	3.53%	-2.41
Cooper	4.52%	-1.42
Howard	3.64%	-2.3
Moniteau	3.62%	-2.32

Source: Distress Criteria Statistical Report (05/2021), StatsAmerica, Indiana Business Research Center, Indiana University

Opportunity Zones

While Boone and Cole counties do not qualify as distressed based on per capita income or unemployment rate, there are opportunity zones in each of these counties which demonstrate that while portions of these counties are prosperous large portions of these counties are also economically distressed.

Jefferson’s City Opportunity Zone includes a large portion of the community and several key economic drivers within the city. Downtown Jefferson City, the former Missouri State Penitentiary Site, Lincoln University, Capital Region Medical Center, Jefferson City High School, multiple city parks and commercial areas along portions of Missouri Blvd. and U.S. Highway 54 are all located in the Opportunity Zone.

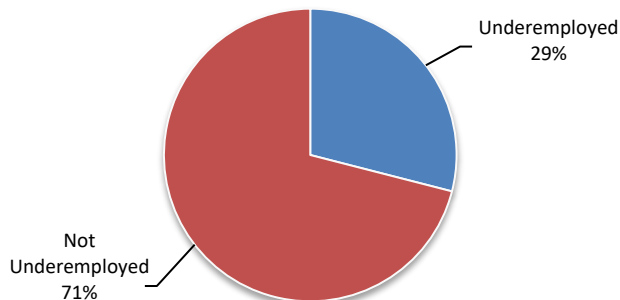
Columbia’s Opportunity Zone takes includes are large area of commercial/industrial property along Paris Road/Route B including major employers such as 3M, Kraft Foods, and Aurora Organic Dairy.

Underemployment

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

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

Figure 2.21 Mid-Missouri Underemployed Workers

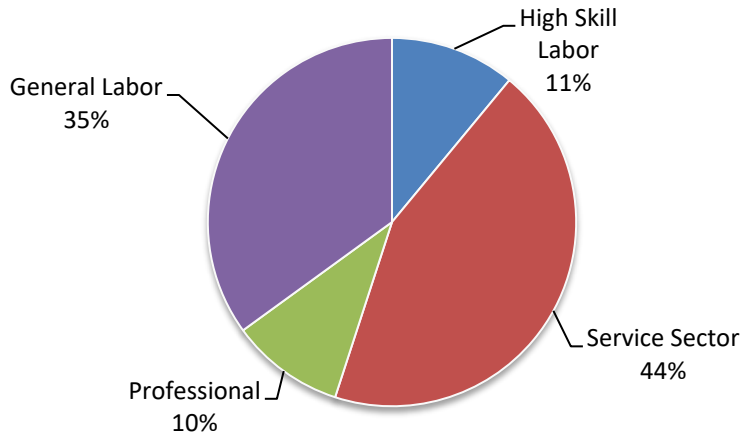


Source: Columbia Missouri Labor Basin Labor Availability Analysis - 2015, The Docking Institute of Public Affairs

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

Figure 2.22 shows that the vast majority of currently underemployed workers are currently working in the service sector or as general laborers.

Figure 2.22 Occupational Sectors of Underemployed Workers



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

Economic Resilience

A common definition of resilience has been elusive in the realms of planning and academia, but in general resiliency is the ability of a community or region to take a hit from a natural and/or economic disaster and to effectively bounce back.

Many factors play a role in how resilient a community or region may be. During this planning process several factors were identified that need to be addressed in order to ensure that Mid-Missouri is more resilient. These factors include, but are not limited to:

- Broadband development
- Entrepreneurship and small business development (including entrepreneurship coaching and access to capital)
- Workforce development
- Improved hospital and healthcare access in rural areas
- Supply chain resiliency
- Increased food security
- Economic sector diversification
- Public infrastructure improvements (including those that mitigate the impacts of natural disasters)
- Continuity of operations planning for private and public sector entities

While there is no absolute measure of resilience, for the purpose of this planning document we review FEMA's Community Resilience Indicators as a means of comparing Mid-Missouri counties to the rest of Missouri and the country. We also reference the writings of Dr. Brian Dabson, Research Fellow at the University of North Carolina at Chapel Hill (and formerly of the University of Missouri), as a basis for discussing resiliency in rural America.

In 2018, FEMA tasked Argonne National Laboratory (Argonne) with analyzing current community resilience research and creating a data-driven method of analyzing community resilience. Argonne's analysis identified 20 commonly used indicators from peer-reviewed research – 11 with a population focus and 9 with a community focus – to measure community resilience along with an aggregate resilience indicator which takes into account all 20 indicators.

Figures 2.23, 2.24, and 2.25 show that all six counties in Mid-Missouri have an aggregate resilience indicator above zero, which means counties in Mid-Missouri have a resilience level greater than the national average. Although FEMA does point out that this analysis is a relative assessment of resilience and that all areas of the country can improve their readiness as we continue to build a culture of preparedness.

Figure 2.23 FEMA Community Resilience Indicators, Mid-Missouri Counties

County	Boone	Callaway	Cole	Cooper	Howard	Moniteau
Aggregate Resilience Indicator 2021	0.24	0.03	0.33	0.20	0.17	0.17
Age: Percent of Population Age 65 and Older	11.87%	15.84%	16.04%	17.20%	18.46%	15.59%
Disability: Percent of the Population with a Disability	11.57%	14.07%	11.02%	15.74%	15.81%	11.76%
Educational Attainment: Percent of Population without a High School Diploma (Age 25 and over)	5.45%	13.79%	7.71%	11.30%	12.10%	14.63%
Unemployment Rate: Percent of the Labor Force That Is Unemployed	4.2%	3.3%	3.6%	4.2%	4.4%	4.3%
Income Inequality: Gini Index	0.47	0.40	0.42	0.41	0.40	0.40
Health Insurance: Percent without Health Insurance (Public or Private)	7.00%	9.10%	8.20%	9.90%	7.80%	14.90%
English Language Proficiency: Percent of Households with Limited English Proficiency	1.94%	0.50%	0.68%	0.08%	0.23%	1.53%
Household Income: Median Household Income	\$55,328	\$56,938	\$60,066	\$52,735	\$52,700	\$58,010
Presence of Mobile Homes: Percentage of Mobile Homes	4.54%	15.95%	2.76%	7.47%	14.14%	8.17%
Home Ownership: Percent of Owner-Occupied Housing Units	50.79%	61.22%	59.97%	61.82%	59.16%	67.63%
Single-Parent Households: Percent of Single-Parent Households	20.77%	22.94%	23.69%	19.05%	21.36%	14.75%
Rental Property Capacity: Percent Vacant Rentals	8.30%	3.00%	7.80%	6.50%	4.30%	7.70%
Mobility: Percent of Households without a Vehicle	6.02%	4.31%	6.73%	5.02%	4.00%	6.92%
Civic and Social Organizations per 10,000 Population	1.55	1.56	2.22	0.57	1.57	0.63
Hospital Capacity: Hospitals per 10,000 Population	0.34	0.22	0.26	0.57	1.57	0.00
Medical Professional Capacity: Health Diagnosing	30.33	14.35	20.06	19.42	15.61	10.78
Affiliation with a Religion: Percent of Religious Adherents	39.30%	35.30%	69.60%	54.30%	54.90%	60.70%
Public School Capacity: Schools per 5,000 Population	1.55	2.67	1.82	4.53	3.48	3.12
Population Change: Percent Population Change	0.33%	0.11%	0.29%	0.18%	0.40%	0.08%
Hotel/Motel Capacity: Hotels and Motels per 5,000 Pop.	0.97	0.78	0.85	1.70	0.00	0.63

Figure 2.24 FEMA County-Level Aggregate Resilience Indicators, Missouri

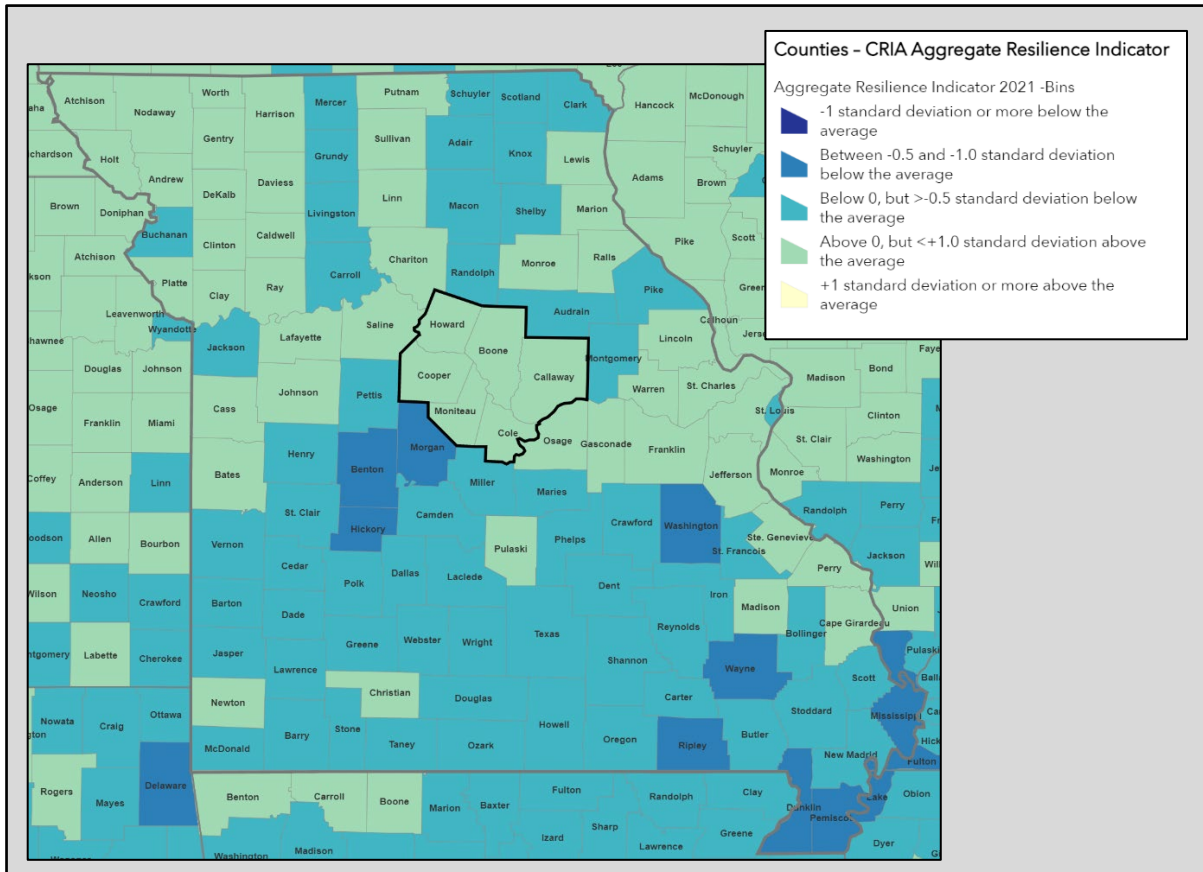
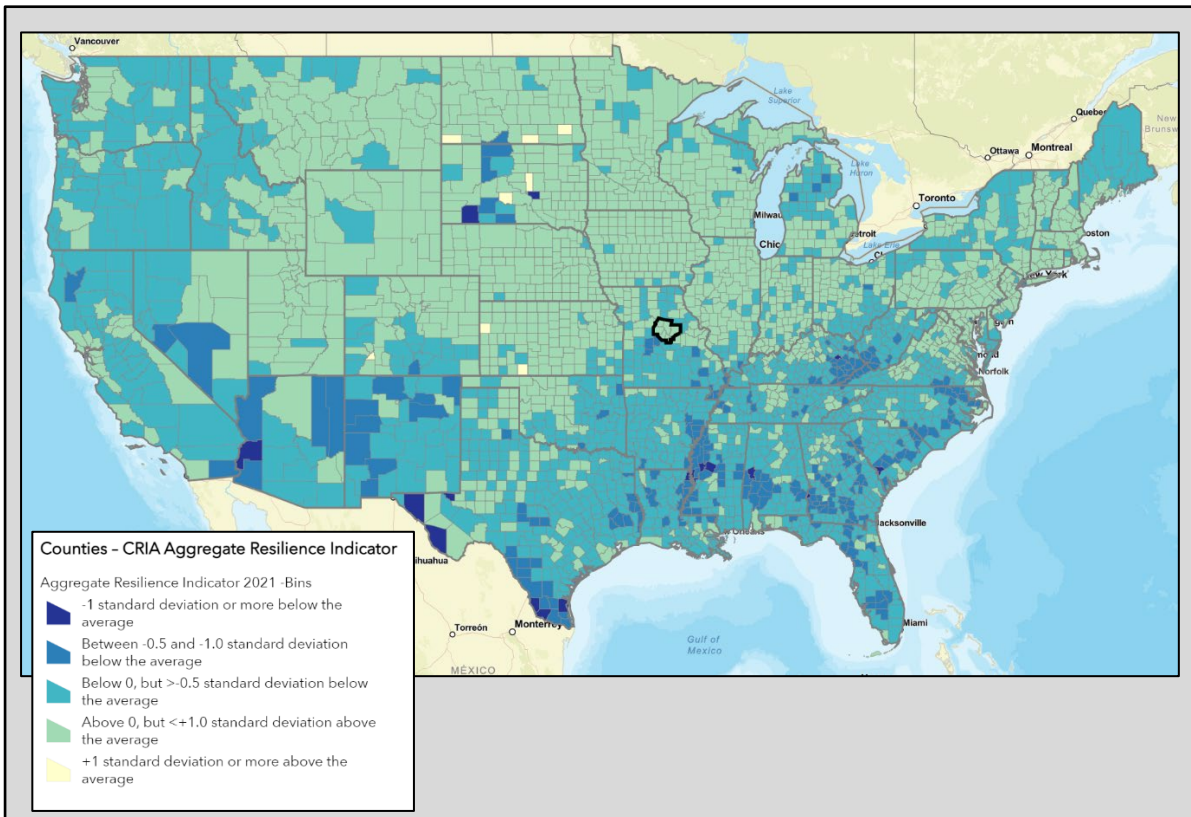


Figure 2.25 FEMA County-Level Aggregate Resilience Indicators, United States (Mid-MO Highlighted)



C. Infrastructure

Broadband

Broadband in Mid-Missouri is a stark contrast between the haves and the have-nots. Broadband service is excellent where electric cooperatives have taken the initiative to build out fiber-to-the-home broadband networks capable of gigabit speeds. Co-Mo Electric Cooperative and Callaway Electric Cooperative have taken on this task under the names Co-Mo Connect and Callabyte respectively. Co-Mo Connect has been a national leader in broadband service among electric cooperatives. It began the process of serving all Co-Mo Electric's service territory, which includes Moniteau and Cooper County in the Mid-MO RPC region. It has since expanded to areas outside this initial service territory to include portions along the western edge of Cole County. Callabyte also uses fiber-to-the-home technology and began its build out within its electric cooperative service territory, Callaway County. Callabyte has since expanded its broadband service territory outside of this boundary – although to date these additional areas are outside of the Mid-MO RPC Region.

In Boone, Cole, and Howard counties, the electric cooperatives have not taken on broadband service as part of their mission. In these counties, private telecommunication companies have taken the lead on providing broadband service which has resulted in some areas having excellent service at gigabit speeds and some areas having poor service or no service at all. Certain private providers are more willing than others to pursue opportunities to expand into rural areas. Socket has been a strong private partner willing to expand to more rural areas not serviced by electric cooperatives.

Broadband service challenges are not just an issue for the rural areas within Mid-Missouri. There are definite gaps in broadband access within even the largest cities in the region – Columbia and Jefferson City. Columbia, in particular, has seen an active local broadband planning effort. The Columbia Broadband Business Planning Task Force reviews existing fiber optic system and service offerings and any opportunities for public and private partnerships with the goal of extending affordable, high speed internet access choices to Columbia residents. The Task Force evaluates the feasibility of additional fiber optic deployment by the City, and if feasible, will formulate and recommend a broadband business plan for the community. The Task Force is currently developing a survey and collaborative broadband coverage map that will identify premises within the city that lack affordable, high speed internet service options to inform its recommendation to the City Council. Possible recommendations could include the establishment of a city broadband utility; voter approved bonding and/or grant seeking authority for new broadband infrastructure; or a public broadband option to include in the offerings of public-private partnerships. Jefferson City stakeholders are also considering setting up their own broadband planning task force.

It should be noted that while we have some idea of the broadband strengths and weaknesses around the region due to discussions with regional stakeholders, broadband planning is extremely difficult because the official broadband maps put out by the Federal Communications Commission (FCC) do not accurately represent where service gaps exist. Current maps are based on self-reported provider data based on census blocks, so that if a single house in a census block has service then the entire census block shows up on official maps as being served. The FCC has committed to changing this census block level mapping, but to date no publicly available maps have been released on a more granular level.

Stakeholder discussions on broadband have noted that capital is a major obstacle for broadband providers to expand their broadband service. One local provider suggested that they often prefer loans to grants. As a result of these conversations, Mid-MO RPC structured its new revolving loan fund (RLF) to have the flexibility to make loans for broadband expansion; however, the primary focus of the new RLF will be small business loans which will force broadband expansion to be a secondary use for the RLF. A dedicated RLF for broadband expansion could be a useful broadband expansion tool moving forward.

Transportation

Highways

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

Figure 3.0 depicts the average annual daily traffic volume in the Mid-MO RPC region. The heaviest traffic volumes in Mid-Missouri are along I-70, U.S. 43, U.S. 63, and U.S. 50.

Figure 3.0 Mid-Missouri Regional Annual Average Daily Traffic

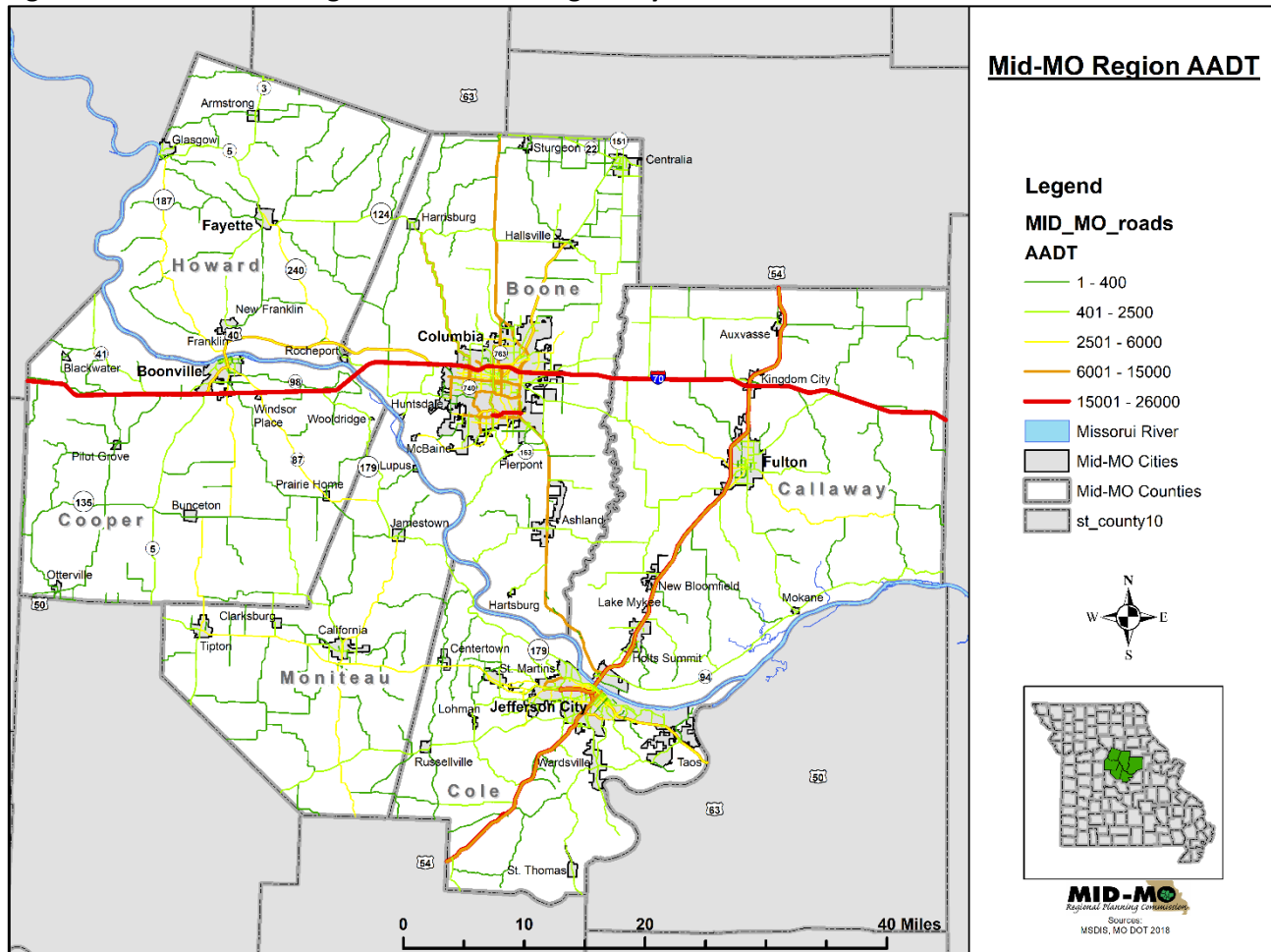
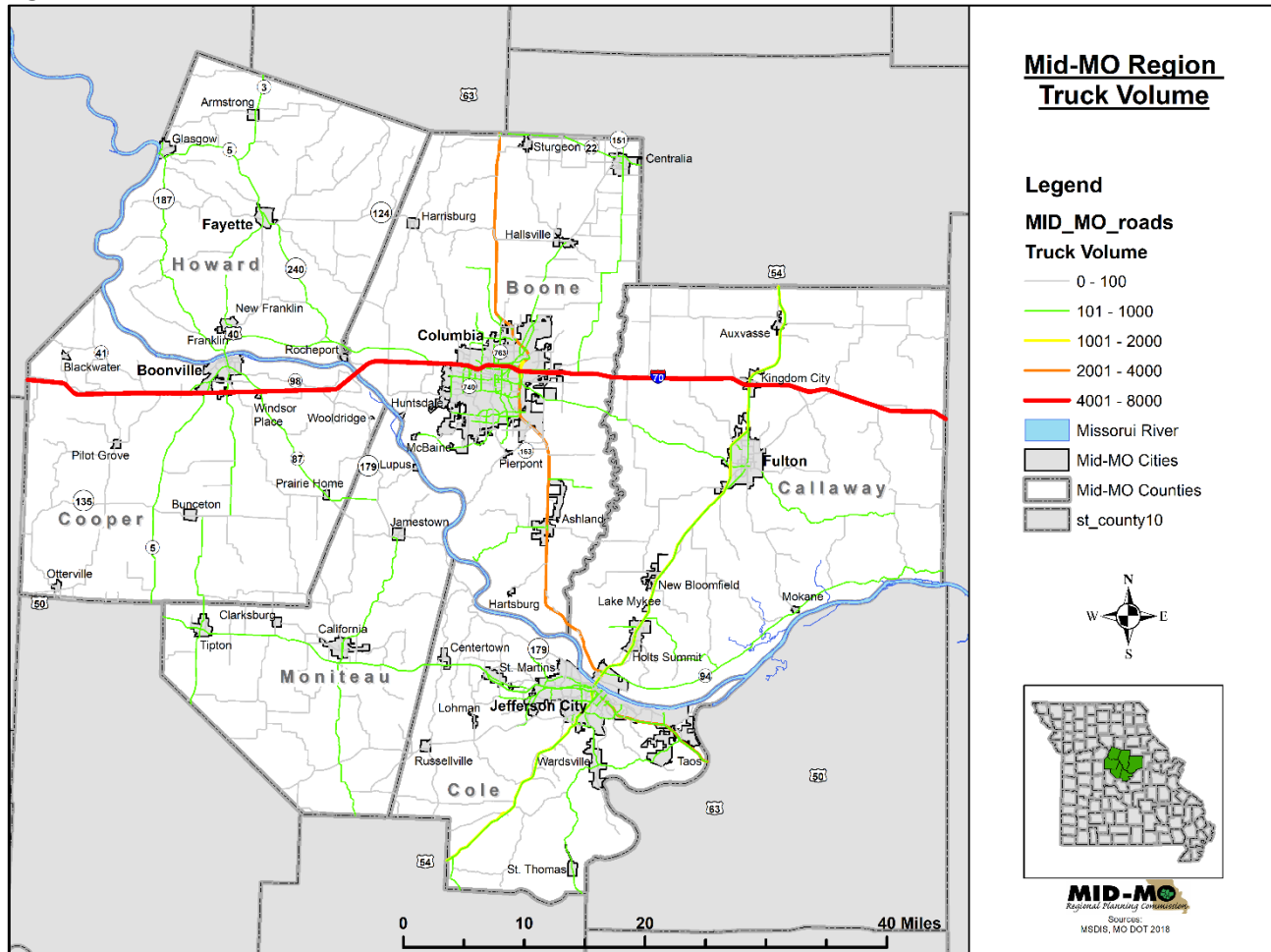


Figure 3.1 depicts total truck volume in the Mid-MO RPC region, and Figure 3.2 depicts the projected truck density growth in Missouri between 2011 and 2030. I-70 has the highest level of truck volume in the region, and truck density along I-70 is expected to increase by 10 to 25 million tons of freight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

Figure 3.1 Mid-Missouri Truck Traffic Volume



Mid-Missouri Regional Planning Commission serves as a regional planning partner with MoDOT working with stakeholders in the six counties within Mid-Missouri to identify road, bridge, and multi-modal transportation needs. In Mid-Missouri we also have two metropolitan planning organizations working with MoDOT to identify transportation needs. These organizations are the Capital Area Metropolitan Planning Organization (CAMPO) – serving Jefferson City, Holts Summit, St. Martins, Wardsville, Taos and certain unincorporated portions of Cole and Callaway counties – and the Columbia Area Transportation Study Organization (CATSO) – serving Columbia and portions of unincorporated Boone County directly outside of Columbia.

Figures 3.2, 3.3, and 3.4 show the road and bridge transportation needs identified by Mid-MO RPC, CAMPO, and CATSO as of February 2021. Mid-MO RPC updates its regional transportations needs list annually through regional meetings in each Mid-MO RPC county and meetings of the Mid-MO RPC Transportation Advisory Committee. This annually updated regional transportation needs list can be found at <https://midmorpc.org/transportation-planning/>.

Figure 3.2 Mid-MO RPC Road and Bridge Priorities 2021

Priority Ranking	Project	Project Description
1	US 50 corridor from California to Sedalia	Expansion of the existing corridor to a four-lane highway from California to Sedalia.
2	US 63/ I-70 Interchange	Improvement of 63/70 interchange to improve traffic flow at the connector
3	I-70/54 Interchange	Improvements to I-70/54 interchange at Kingdom City
4	MO River Bridge	Extend 3 lanes from MO river bridge to Hwy 63 Interchange
5	US 50/63 (Rex Whitton)	Reduction or elimination of stop lights in Jefferson City and addition of 3rd lane between Monroe and Broadway

Figure 3.3 CAMPO Road and Bridge Priorities 2021

Priority Ranking	Project	Project Description
1	Corridor Improvements at the MO River Bridge	Widen US 54/63 to provide 3 continuous through lanes in each direction from Missouri River Bridge to US 54/63 interchange.
2	Rex Whitton Expressway Improvements	Implement major capacity improvements, which could include mainline widening, grade separations and/or outer roads. US 50/63 from US 54 to Lafayette ST
3	Hwy 54/Simon Blvd Interchange in Holts Summit	Reconfigure interchange (Installation of roundabouts) to address close outer road spacing and capacity issues; incorporate pedestrian facilities crossing US 54. US 54/RT OO
4	Hwy 54/Ellis BLVD/Southwest BLVD Interchange	Reconfigure interchange to address capacity and close spacing of outer roads. Create pedestrian connection across highway.
5	Hwy 50 & Truman Blvd/Country Club Dr Interchange	Reconfigure interchange to address close outer road spacing; widen westbound off-ramp to improve capacity; incorporate pedestrian facilities into the interchange.

Figure 3.4 CATSO Road and Bridge Priorities 2021

Priority Ranking	Project	Project Description
1	Gans Road Extension/Realignment	Gans Road Extension/Realignment: Providence RD to Bearfield RD
2	Rte 63/AC Interchange	Route 63/AC interchange reconstruction
3	Rte 63/WW Interchange	Route 63/WW interchange reconstruction, existing/new bridge
4	US 63/Interstate 70 Interchange/Connector	US 63/Interstate 70 interchange/connector improvements
5	I-70 Drive SW (Outer Road) Extension	Extend I-70 Drive SW near Sorrels Overpass to West Van Horn Tavern RD to create a I-70 detour route.

Rail

There are five railroad companies operating on 373 miles of track in the Mid-MO RPC region. These railroad companies consist of three Class I railroads, one terminal railroad, and one out of service local railroad. Figure 3.5 depicts the railroad operators, their classification, and miles of track within Mid-Missouri and the state.

Figure 3.5 Mid-MO RPC Railroad Operators

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

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

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

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

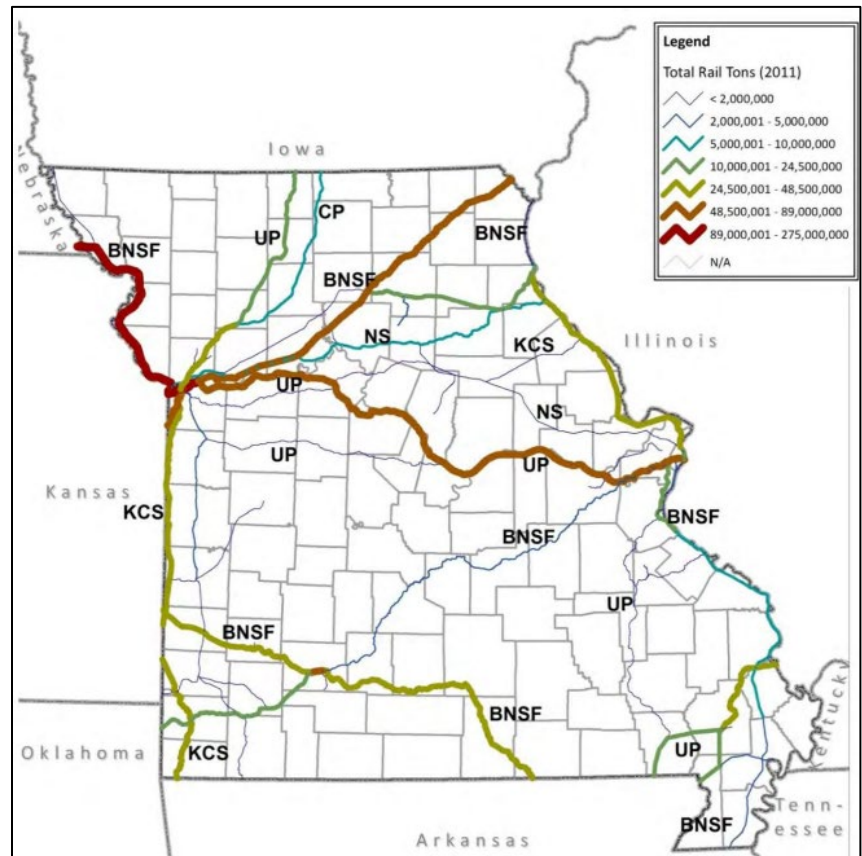
Figure 3.6 Mid-MO RPC Rail Lines

Figure 3.6 illustrates the locations of the rail lines within the Mid-MO RPC region. Union Pacific, Kansas City Southern, Norfolk Southern, and COLT all serve the Mid-Missouri region. Five of Mid-MO RPC's six counties have active rail lines.



Figure 3.7 depicts the rail line operators in Missouri and the freight density traversing these lines in tons. The Union Pacific line running through the Mid-MO RPC region is one of the major rail lines in the state.

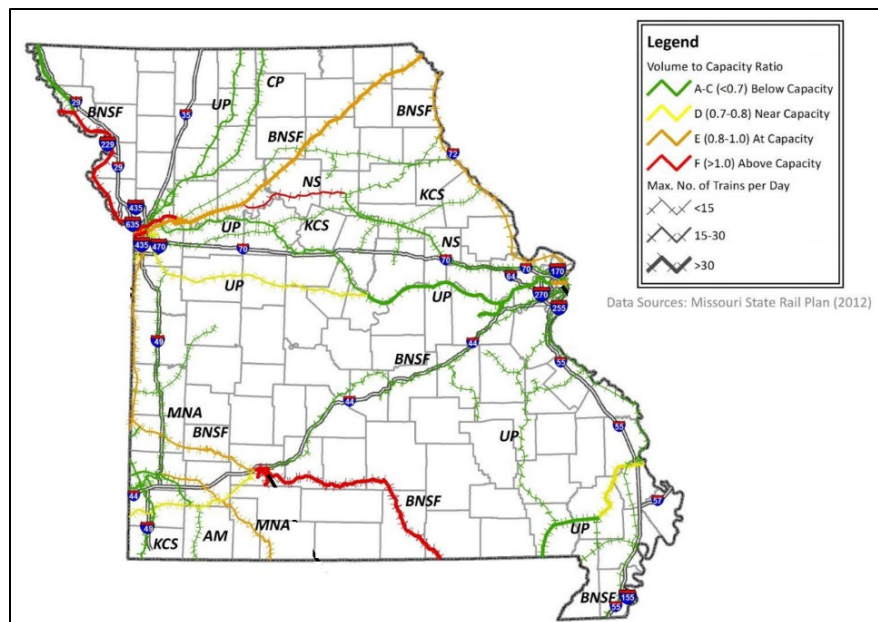
Figure 3.7 Missouri Rail Density



Source: Missouri State Freight Plan (2017)

Figure 3.8 shows rail capacity across Missouri in 2012, which is the most recent data publicly available until MoDOT completes its current Freight and Rail Plan update.

Figure 3.8 Missouri Rail Capacity



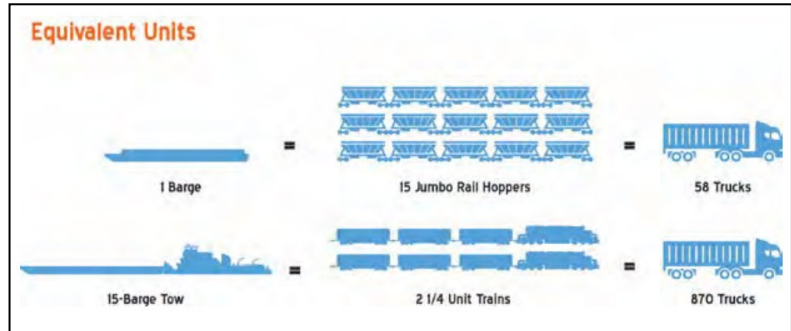
Source: Missouri State Freight Plan (2017)

Improved rail infrastructure in the region has been identified by multiple stakeholders as a major need in the region. The need for additional and/or improved rail spurs have been identified in each county within the region. Specific upgrades include upgrades to the COLT rail line – which runs through Boone County from Centralia to Columbia, rail infrastructure expansion around Centralia, rail improvements to the Union Pacific owned spur which runs through Jefferson City, and other rail expansion that may benefit the Heartland Port Authority.

Ports and Navigable Waterways

The Missouri River runs through the heart of the Mid-MO RPC region and is the only navigable waterway in the region capable of carrying commercial goods and products. The Missouri River is currently an underutilized regional asset, but stakeholders in the region understand the river’s economic development potential. Barges offer greater freight capacity than other freight transportation modes, as

Figure 3.9 Freight Capacity Comparison



shown in Figure 3.9. A standard tow (15 barges) has a capacity of 22,500 tons. It would take approximately 225 railroad cars or 870 semi-trucks to carry the same amount of cargo as a standard tow.

There are currently two port authorities in Mid-Missouri. The Howard/Cooper County Regional Port Authority is located on the Howard County side of the river just across from Boonville. The recently created Heartland Port Authority was officially recognized as a public port authority in 2018 and serves Cole and Callaway County.

Heartland Port Authority

The Heartland Port Authority is a newly created port authority spanning Cole and Callaway counties. Established in 2018, the Heartland Port Authority has been laying the groundwork for successful operations including completing a multimodal port feasibility study in 2018, a comprehensive market study in 2020, and taking steps to acquire land for a site. The port feasibility study analyzed two possible options for moving forward with the Heartland Port. One option would have a single site on the south side of the Missouri River in Cole County and the second option would use the same South Site and add an additional site along the north side of the river in Callaway County. The feasibility study also includes a benefit-cost analysis which shows that both options have a benefit-cost ratio greater than 1. The Heartland Port Authority also took a large step this past year when the property identified for the South Site was included in the Missouri’s annual conveyance legislation passed by the Missouri state legislature and signed by the Governor. This was the first step in having the state potentially sell the South Site property to the Heartland Port Authority. Heartland is in the process of preliminary engineering and environmental studies on the South Site.

With the Heartland Port being a multimodal port, the port authority has also identified the importance that short line rail will play in the success of the port and need for improvements to rail that will be connected to the port authority and the businesses it serves.

Howard/Cooper County Regional Port Authority

The Howard/Cooper County Regional Port Authority is located on the Howard County side of the Missouri River just across from Boonville. It is the only river port in Mid-Missouri that is currently moving product along the Missouri River. MFA is the primary industry partner of the port currently, and accordingly agricultural products are what have been shipped out of the port recently. The port currently has major infrastructure needs to be successful moving forward. It is currently relying on rented conveyer equipment to load barges. The port authority is searching for funding for permanent conveyer equipment which will make their service more reliable. They also need dolphins to allow barges to more easily anchor in place while being loaded or unloaded.

Airports

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

Columbia Regional Airport (COU)

The Columbia Regional Airport, the only commercial airport in the region, is owned and operated by the City of Columbia. The airport is in the middle of major infrastructure improvements including new terminal construction and runway expansion. The smaller runway (13/31) was the first to be extended from 4401 feet long and 75 feet wide to 5500 feet long and 100 feet wide which allowed for operations to continue as work is completed to runway 2-20. The runway 2-20 extension will take the runway from 6,501 feet long and 150 feet wide to 7,400 feet long. Runway 2-20 expansion is scheduled to be completed by late 2021 and new terminal construction should be completed by Summer 2022.

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

Jefferson City Memorial Airport (JEF)

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

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

The Capital Area Metropolitan Planning Organization (CAMPO) has identified the need for rehabilitation of SRE/ARFF facility which have been damaged by recent flooding, and taxiway A South reconstruction and Taxiway A North lighting improvements.

Fulton-Elton Hensley Memorial Airport (FTT)

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

Airport services include corporate flying, flight training, and recreational flying. Several companies rely on the airport to transport staff, equipment, and goods in and out of the region. Aerial pipeline inspectors and seasonal aerial agricultural sprayers rely on the airport for aviation-related services. Students, staff, and visitors to William Woods University and Westminster College located in Fulton, also frequently use the airport. The Missouri National Guard uses the airport's grass strip and other amenities for training personnel.

Jesse Viertel Memorial Airport (VER)

Jesse Viertel Memorial Airport is located between the Missouri River and I-70 in Boonville and is owned and operated by the City of Boonville. The airport has one asphalt paved runway which is 4,000 feet in length and 75 feet wide.

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

II. SWOC Analysis

This section is devoted to an analysis of the strengths, weaknesses, opportunities, and challenges of the Mid-Missouri economy. It draws on the data collected and analyzed in the Regional Overview, Regional Economy, and Infrastructure sections of this plan. Mid-MO RPC's standing CEDS committee met to create to create this SWOC analysis and ensure it is a true representation of the region.

Figures 4.0 and 4.1 lay out the strengths, weaknesses, opportunities, and challenges in the region as identified through data analysis and public outreach in the region. Several items listed in Figures 4.0 and 4.1 are then elaborated on in more detail in the text below.

Figure 4.0 Mid-Missouri SWOC Analysis - Regional Strengths/Opportunities

Strengths / Opportunities
<ul style="list-style-type: none">• Broadband – portions of region are national leaders in fiber-to-the home• Highway network in the region (I-70, US-54, US-63, US-50)• Regional airport expansion• Central location of the region• Mid-MO is prime location for distribution centers• Willingness to work regionally• University of Missouri's economic development mission including commercializing university research• Life science / bioscience sector and infrastructure• Nuclear infrastructure including University of Missouri Research Reactor (MURR) and Callaway Energy Center• Discovery Ridge Research Park• Higher education partners in the region (both 2-year and 4-year institutions)• Entrepreneurship development is a strength that can be built on with additional facilities like more shared office space and commercial kitchen space• Competitive electric rates• Quality of life/recreational opportunities• Low crime rates• Low cost of living• Healthcare industry in Boone and Callaway counties• High economic resilience• Redevelopment opportunities are abundant

Figure 4.1 Mid-Missouri SWOC Analysis - Regional Weaknesses/Challenges

Weaknesses / Challenges
<ul style="list-style-type: none">• Broadband access still lacking or insufficient in many parts of the region• Highway infrastructure condition and funding• Rail infrastructure - Class 1 rail lines traverse the region but there is a lack of rail spurs and improvements needed to existing short line rail• Port infrastructure needed to better utilize the Missouri River• Wastewater infrastructure, especially in small/rural communities• Private sector employers have identified major needs for workers with specific technical skills especially in the construction trades, health care, information technology, agriculture, and advanced manufacturing sectors• More public sector training needed, especially as it pertains to law enforcement, water and wastewater operators, and information technology• Lack of wet lab space• No space for businesses graduating from MU Life Science Incubator• Higher education enrollment is down• Losing talent in the region to larger cities• Low unemployment rate• Underemployment• COVID has revealed supply chain challenges• Lack of housing and affordable housing• Lack of child care and affordable child care• Tourism industry in the region has been hit hard by COVID• Downtowns in many communities need funding for revitalization• Buy local initiatives supporting small businesses could be strengthened• Access to capital a challenge for small businesses and start-ups, especially after the pandemic• Transit services availability and access• Entrepreneurship resources stronger in some areas than others• Women and minority entrepreneurship is a challenge nationally and opportunities within the region targeting these groups need continued support and expansion• Healthcare access lacking in rural communities• More shovel ready/certified sites need in the region.• Lack of funding for small rural economic development organizations• Lack of secondary processing for value added agriculture• State government employee pay and employment levels• Budget cuts for higher education

Strengths/Opportunities

Broadband. The availability of gigabit Internet speeds is increasing around the nation, but it is still a rare asset. It is especially rare in rural area. Many major metropolitan areas still do not have fiber to the home capabilities. Mid-MO RPC has multiple gigabit Internet service providers and five of Mid-MO RPC's six counties have residential gigabit broadband access. Gigabit Internet is even available in many rural parts of Mid-Missouri. Broadband is still the prime example of haves and have-nots. Some areas have great access and others have little or no access. Broadband affordability is also an issue that has come up in discussions.

Highway network. Interstate 70, which runs through the heart of Mid-Missouri, is the most vital transportation asset in the region. It not only connects Mid-Missouri to the state's two largest cities -- St. Louis and Kansas City -- it also is one of the nation's most heavily traveled roadways. Mid-Missouri is also a location where several important highways converge, including I-70, US-63, US-54, and US-50. Through a planning partnership with MoDOT, Mid-MO RPC maintains the region's list of road and bridge and multimodal priorities. The highway network in Mid-Missouri is a clear strength, however, more funding to maintain the current system and for highway network improvements that improve safety and encourage economic development are a big need for the region.

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

Life science / bioscience sector and infrastructure. Past investments like the Christopher S. Bond Life Sciences Research Center and the Monsanto Place Life Sciences Business Incubator have proven to be significant assets to growing a life science industry cluster in the region.

University of Missouri Research Reactor (MURR). The University of Missouri Research Reactor (MURR) is the key piece of infrastructure for the region. As the largest nuclear research reactor in the country, MURR is a substantial draw for companies that need this type of unique asset.

Callaway Energy Center. Nuclear energy production is a cornerstone of the Mid-Missouri economy with the Callaway Energy Center employing around 1,000 employees in the region. In past years, proposals have been put forward to build a second nuclear power plant in Callaway County and to develop the capacity to manufacture small modular reactors (SMRs) in Callaway County but the projects have never fully materialized. Federal government energy policy tied to efforts to combat climate change could have a significant impact on the future of the Callaway Energy Center if climate change efforts include an embrace of nuclear energy.

Abundant redevelopment opportunities. There are abundant opportunities in the region to redevelop large facilities that could have major impacts on the region. Boonville's redevelopment of the former Kemper Military Academy Campus continues to progress and there are still buildings in need of renovation in order to continue the progress being made. In Jefferson City, the former Missouri State Penitentiary is a historic property that has started attracting visitors to the area in recent years, although the 2019 tornado and COVID-19 have been challenging to revitalization efforts there.

Weaknesses/Challenges

Rail infrastructure. Rail access is a vital economic development asset, and five of Mid-Missouri's six counties have active Class 1 rail lines running through them. The Union Pacific line that runs along the Missouri River and through Mid-Missouri is one of the most heavily utilized freight lines in the state. Despite this infrastructure in place, Mid-MO RPC's CEDS committee was vocal in the need for more rail infrastructure. There are not enough rail spurs in the region and those that do exist are in dire need of repair. Short line rail infrastructure improvements are also an important need identified by the CEDS committee.

Port Infrastructure. The Missouri River is an underutilized resource in Mid-Missouri, and regional partners are well aware of the need to improve port infrastructure so we can better utilize this resource. Both the Heartland Port Authority and Howard/Cooper County Port Authority are making strides, but both entities need public sector investment through federal and state grants to get their facilities to a point where they will be self-sufficient.

Low unemployment rate. While low unemployment is a positive economic indicator, it is sometimes a challenge for economic development professionals in the region. It concerns some potential employers because it suggests that they may have a difficult time finding employees to fill their positions. Economic developers in the region have turned to labor force studies as a key tool to inform employers that the workforce exists in the region despite these low unemployment numbers.

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

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

Access to capital. Small businesses and start-ups struggled with access to capital prior to COVID-19, and the pandemic has only increased the need for capital access. Mid-MO RPC recently been awarded a \$1.5 million grant from EDA to start a revolving loan fund in the region, which greatly help address this need. The feedback from the CEDS committee was very positive regarding the \$1.5 million fund which was only made possible through regional collaboration; however, the consensus opinion is that more access to capital is still needed in the region. Mid-MO RPC and other partners will continue to pursue opportunities that will increase capital access for small businesses and start-ups.

Tourism. Five years ago, tourism was listed as a strength in Mid-MO RPC's CEDS due to the industries numerous successes in recent years. Destinations like University of Missouri for college sporting events, Isle of Capri Casino, Warm Springs Ranch (home to the Budweiser Clydesdales), and former Missouri State Penitentiary draw large numbers of visitors from outside the region. Several festivals such as Columbia's Roots & Blues and True/False Film Festival have also started garnering national attention, and the central location of the region makes it an ideal location for statewide events. As in the rest of the country, COVID-19 has been devastating to the tourism industry in Mid-Missouri. Marketing these and other regional tourism assets would greatly help the tourism industry in Mid-Missouri as would infrastructure projects that would help support tourism. Jefferson City is considering building a regional ice arena and hockey

venue near the former Missouri State Penitentiary site and soon to be new convention center. Boone County fairground expansion has been a priority discussion item in recent years. Agricultural tourism opportunities are also abundant throughout the region in places like the Columbia Agriculture Park. Marketing efforts to promote downtown businesses and local festivals could also prove vital as main street businesses often benefit from the tourist foot traffic at their businesses.

Healthcare Access in Rural Communities. Rural hospitals have struggled throughout the country which is evident in Mid-Missouri. Boonville recently lost its local hospital, and its economic development organization has made it a top priority to address the need for healthcare access in the wake of this closure. In Fulton, the hospital was on the brink of closure a few years ago and still faces an uncertain future like many rural hospitals.

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

III. Strategic Direction

The Vision

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

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

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

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

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

The Mission

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

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

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

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

Goals, Objectives, and Strategies

Regional goals, objectives and strategies were formulated during the CEDS planning process with input from the Economic Development Advisory Committee, Mid-MO RPC membership, and numerous stakeholders from around the region. The goals, objectives and strategies of multiple planning and development organizations operating in the region have also been reviewed in order to discern areas of overlapping interest which may lead to strategic partnerships. The goals, objectives and strategies were designed to capitalize on regional assets and current opportunities and to respond to current and projected conditions in the region.

Goal: Create and retain quality jobs in the region

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

- **Strategy # 1** – Provide linkages between communities/organizations and funding resources.
- **Strategy # 2** – Provide direct technical assistance to communities and organizations.
- **Strategy # 3** – Focus on infrastructure develop through both planning efforts and project development activities, including grant writing and administration.
- **Strategy # 4** – Assist planning partners and other regional organizations with their identified economic development activities including:
 - Cluster development including radiopharmaceuticals, health science and services, life sciences, finance and insurance services, agriculture, logistics and distribution, and tourism.
 - Encourage technology transfer and entrepreneurial incubation and acceleration
 - Workforce development initiatives, especially those that focus on technical skills and/or closely incorporate employer-based curriculum
 - Entrepreneurship development through technical assistance and increasing access to capital.

Goal: Maintain and develop new infrastructure that will encourage economic development

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

- **Strategy # 1** – Maintain the Mid-Missouri Regional Transportation Plan which identifies and prioritizes transportation projects within the region.
- **Strategy # 2** – Promote and engage in local and regional long-range planning
- **Strategy # 3** – Assist partners with their infrastructure projects and initiatives.
 - Infrastructure that helps create competitive industrial sites
 - Road and bridge infrastructure that increases the capacity of our transportation system, especially in cases where new or expanding businesses drive the need for increased capacity.
 - Encourage multimodal transportation expansion including rail spurs, ports, airports, transit, and pedestrian infrastructure.
 - Workforce development infrastructure
 - Infrastructure at the University of Missouri that promotes economic development including MURR, MU Life Science Business Incubator, Discovery Ridge Research Park, and NextGen Precision Health.
 - Redevelopment of existing regional assets including the former Missouri State Penitentiary, The Loop in Columbia, Kemper Military academy, and others.
 - Downtown revitalization efforts including addressing structurally deficient downtown buildings.
 - Expand housing supply, including housing that would serve the needs of lower- and middle-income individuals and families.
 - Expand access to broadband

- Encourage environmentally sustainable infrastructure.
- **Strategy # 4** – Provide member communities linkages to information about the latest infrastructure funding and initiatives.
- **Strategy # 5** – Encourage the development of new parks, trails, and other recreational opportunities both as a means to improve quality of life for residents and as potential attractions to encourage tourists and others living outside the region to visit.

Goal: Be competitive and prepared for opportunities

Objective: Ensure that Mid-Missouri communities and regional stakeholders do the planning, engineering, and feasibility study work that allows them to take advantage of and be competitive for opportunities.

- **Strategy # 1** – Provide technical assistance for members and regional entities whether through leading planning efforts (comprehensive plans, economic development strategies, and planning efforts that encourage resiliency), participating in planning processes, or assisting stakeholders acquire funding to conduct planning services.
- **Strategy # 2** – Support and assist planning partners and other regional organizations with their community and economic development goals.
- **Strategy # 3** – Prepare, with the collaboration of the EDAC, a Comprehensive Economic Development Strategy every five years, and review the related work plans annually.

Goal: Entrepreneurship and small business development

Objective: Better leverage current resources and develop additional resources for entrepreneurship and small business development.

- **Strategy # 1** – Encourage the creation of capital investment resources including RLF development in the region.
- **Strategy # 2** – Assist partners in leveraging financing and technical resources for entrepreneurial and economic development activities.
 - Expand business planning and entrepreneurship coaching services
 - Create more spaces where entrepreneurs may share equipment or other resources that would otherwise be financially unfeasible for companies in early stage development, including: shared commercial kitchen space, wet lab space, office space, and more.
 - Support for small local farmers and/or entrepreneurs that utilize local agriculture producers as suppliers for their products or services.

Goal: Create a more economically resilient region

Objective: Increase economic resiliency in the region through planning and technical assistance.

- **Strategy # 1** – Promote and/or facilitate Continuity of Operations Planning (COOP) among communities and businesses in the region.
- **Strategy # 2** – Engage efforts to encourage the mitigation of natural and human-made hazards through both planning initiatives and technical assistance in developing projects that may lead to hazard mitigation.
- **Strategy # 3** – Engage in educational efforts on the need to consider resiliency principles in all planning activities.
- **Strategy # 4** – Support efforts to diversify the regional economy by attracting and developing new industries.
- **Strategy # 5** – Support efforts to strengthen and diversify existing supply chains.

Goal: Create a region with more equity

- **Strategy # 1** – Provide technical assistance to low-to-moderate income communities including providing planning services, project development assistance, and grant writing and administration services.
- **Strategy # 2** – Encourage entrepreneurship development especially among populations that have traditionally been underserved and underrepresented within the entrepreneurship space.
- **Strategy # 3** – Revolving Loan Funding (RLF) development which will provide access to capital to traditionally underserved populations.
- **Strategy #4** - Support for small local farmers and/or entrepreneurs that utilize local agriculture producers as suppliers for their products or services.
- **Strategy # 5** – Work to expand housing supply, including housing that would serve the needs of lower- and middle-income individuals and families.
- **Strategy # 6** – Work to expand childcare access.
- **Strategy # 7** – Work to increase transit services and expand pedestrian friendly transportation.
- **Strategy # 8** – Expand broadband access in unserved and underserved areas and encourage broadband affordability for low-income individuals and families.

Goal: Create informed communities, citizens, and stakeholders

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

- **Strategy # 1** – Obtain and disseminate information about current opportunities and developmental resources.
- **Strategy # 2** – Plan and facilitate regular meetings of the membership and various committees to review and respond to information about economic activities and opportunities.
- **Strategy # 3** – Keep abreast of “best practices” in regard to economic development by participation in professional organizations and systematically reviewing pertinent literature.
- **Strategy # 4** – Support and assist planning partners and other regional organizations with their identified educational and communication activities.

Goal: Maintain and further develop an efficient and effective regional planning commission

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

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

IV. Implementation/Action Plan

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

Action Plan - The Work Program

Mid-MO RPC submits work programs to EDA which reflect the work Mid-MO RPC staff will engage in as part of our organization's efforts to implement the goals and strategies identified in this CEDS document. These work programs are tied directly to the goals and strategies laid out in Mid-MO RPC's five-year Comprehensive Economic Development Strategy. The following work program reflects the activities Mid-MO RPC will engage in over the next year.

Local Planning and Technical Assistance - WP #1

Mid-MO RPC staff will provide planning and technical assistance to member communities, local economic development organizations, non-profits, entrepreneurs, and other stakeholders in the region to the extent that this assistance may contribute to community and economic development efforts which work towards achieving the goals, objectives, and strategies identified in this CEDS.

Economic Development Advisory Committee – CEDS Updates - WP #2

Mid-MO RPC will continue to hold regular meetings of the Economic Development Advisory Committee (EDAC) which serves as our standing CEDS committee. EDAC meetings will include informational programs to assist MID-MO RPC membership and partners with community and economic development efforts, and also encourage local stakeholders to share what community and economic development efforts are underway in their respective communities in an effort to encourage collaboration, build regional relationships, and learn best practices from neighboring communities.

Community and Public Education Activities - WP #3

Mid-MO RPC will engage our member communities, local economic develop organizations, non-profits, entrepreneurs, other stakeholders in the region and the public regarding community and economic development issues. This will be accomplished through a variety of formats including public presentations, individual meetings, Mid-MO RPC's website (www.midmorpc.org), newsletters and other printed materials, social media, email, and other means.

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

Mid-MO RPC staff perform administrative activities include preparing and submitting various EDA reports and internal financial tracking that supports our EDA partnership planning grant. Mid-MO RPC staff will also engage in professional development activities that will maintain and further develop the capabilities of our staff in order to achieve the goals, objectives, and strategies outlined in this CEDS.

Relationship Between CEDS Goals and The Work Program

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

Goal: Create and retain quality jobs in the region

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

Goal: Maintain and develop new infrastructure that will encourage economic development

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

Goal: Be competitive and prepared for opportunities

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

Goal: Entrepreneurship and small business development

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

Goal: Create a more economically resilient region

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

Goal: Create a region with more equity

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

Goal: Create informed communities, citizens, and stakeholders

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

Goal: Maintain and further develop an efficient and effective regional planning commission

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

Planning Partners/Organizational Resources

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

Economic Development Organizations (EDOs) (listed alphabetically)

Boonslick Community Development Organization is a 501(c)3 organization that serves as the economic development organization for the City of Boonville and Cooper County.

Callaway Chamber of Commerce is the organization responsible for leading economic development initiatives throughout Callaway County.

Jefferson City Regional Economic Development Partnership. The Jefferson City Area Chamber of Commerce had long served as the economic development organization for the Jefferson City area. In 2020, the strategic decision was made to split the Jefferson City Area Chamber of Commerce into two organizations. The Jefferson City Area Chamber of Commerce will continue to serve the traditional roles played by a chamber of commerce, but the economic development duties will now be served by the newly formed Jefferson City Regional Economic Development Partnership.

Moberly Area EDC (MAEDC) serves as the economic development organization for Howard County. MAEDC was organized in 1988 to promote economic growth and investment in Moberly and Randolph County. Today MAEDC serves Randolph, Monroe, and Howard counties with MAEDC functioning as the lead economic development for all counties.

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

Regional Economic Development Inc. (REDI) is a nonprofit, public/private partnership created to enhance the vitality of business and increase the number of quality, sustainable jobs in Columbia and Boone County. REDI is funded by the City of Columbia, Boone County, the University of Missouri, the Columbia Chamber of Commerce, and over 100 local businesses and municipalities to coordinate the area's economic development activities.

Southern Boone EDC is dedicated to economic development in southern Boone County (Ashland area) and has played a pivotal role in bringing a new Ranken Technical College campus to Mid-Missouri and creating a new YMCA branch in Ashland.

Higher Education Institutions (alphabetically listed)

Central Methodist University offers educational opportunities ranging from high-school dual credit to graduate degrees and has a total enrollment of more than 5,000 students statewide. CMU's main campus (known as the College of Liberal Arts and Sciences-CLAS) is located in Fayette.

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

Moberly Area Community College's main campus is located outside of the Mid-Missouri region, but it's Columbia campus has seen considerable growth over the last several years and MACC has been a strong workforce development partner in Columbia. MACC's Mechatronics program was created through collaboration between Moberly Area Community College Columbia Higher Education Center, Regional Economic Development Inc. (REDI), Columbia Area Career Center, Missouri Career Center, and manufactures in the Columbia area including 3M, Kraft, Quaker, Gates Corp, and American Air Filter. The program was developed due to a high demand regionally and nationwide for well-trained technicians in the manufacturing sector. The Mechatronics program combines courses in electrical engineering, mechanical engineering, computers, and control systems to train students in careers working as high-skilled technicians in modern manufacturing facilities. The curriculum places a strong emphasis on hands-on training in order to reinforce lessons learned in the classroom. When students complete the program, they will have the ability to understand the manufacturing process from beginning to end and have the skills to troubleshoot anywhere along the production line.

Ranken Technical College is coming to Mid-Missouri thanks in large part to a \$4.5 million grant from EDA. The campus will focus training students for careers in the construction trades, healthcare industry, and information technology (IT). The project will be located on a 5-acre site in Ashland. Initial conversations with industry partners have already shown a tremendous need that may require another construction phase that would expand the 5-acre campus to a 10-acre campus.

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

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

University of Missouri, the state's flagship university, is located in Columbia. The University of Missouri is a \$2.1 billion enterprise that accounts for 72% of the research dollars flowing through Missouri's public universities. Economic development is an important part of the university's mission statement. MU boosts the economy by performing research, generating jobs, sharing knowledge, improving graduates' earning potential, and creating and commercializing businesses.

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

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

Other Economic Development Planning Partners and Stakeholders

Central Missouri Community Action (CMCA) serves all six Mid-MO RPC counties by providing core services include job readiness training; job search assistance; career exploration and assessment; case management; financial assistance for certain career and technical training programs; and on the job training.

Columbia Chamber of Commerce is a non-profit, voluntary, member-supported organization of business, industrial, and professional people who are dedicated to developing, promoting, and maintaining a sound a health economic climate for Columbia.

Enterprise Development Corporation was established in 1983 as Certified Development Company (CDC), a nonprofit corporation created to encourage economic development in Mid-Missouri. Enterprise Development works with the SBA and local banks to provide financing to small businesses through the SBA 504 Loan program. Enterprise Development Corporation follows a community lending model. As you can see by the maps below, we try to only loan within a 100-mile radius of Columbia

Jefferson City Chamber of Commerce is focused on promoting economic vitality and strength in the Jefferson City area and being a leading public policy advocate for business people, to provide valuable services to the area's business community, and participate and partner in activities that improve the area economy of quality of life.

The **Missouri Innovation Center** is a non-profit organization focused on providing support for high growth business ventures that improve human life and sustainability. It offers services in mentoring, securing financial support, and providing necessary resources for conducting successful and focused research and development. The Missouri Innovation Center also serves as the resident manager of the MU Life Science Business Incubator.

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

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

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

The **Missouri Women's Business Center (MoWBC)** provides small business development assistance to aspiring women, with a focus on minority and low-to-moderate income-based entrepreneurs throughout Mid-Missouri. MoWBC is a program of Central Missouri Community Action and is funded in part by the federal Small Business Administration.

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

Funding Sources

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

Economic Development Administration (EDA) planning partnership funding is a vital component of Mid-MO RPC's ability to develop economic development projects in the Mid-Missouri region. Public Works and Economic Adjustment Assistance grants from EDA have proven instrumental in the development of several major economic development projects in the region, including: construction of the MU Life Science Business Incubator at Monsanto Place, redevelopment of the Kemper Military Academy as an IT training center, and Discovery Ridge Research Park development. 2019 disaster funding and CARES Act funding has also been instrumental in the last year funding improvements to the former Missouri State Penitentiary Site as Jefferson City constructs a new convention center, a new Ranken Technical College in Ashland, and a new revolving loan fund for the region.

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

Missouri Department of Transportation (MoDOT) has several funding sources available for local communities to improve their infrastructure. Popular programs include transportation alternatives program, freight enhancement program, off-system bridge replacement and rehabilitation, and the cost share program.

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

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

Federal Emergency Management Agency (FEMA) offers a variety of funding opportunities including individual and public assistance after presidentially declared disaster events, as well as hazard mitigation grant funding designed to create more resilient communities by mitigating the impact of natural disasters.

EDA Project Prioritization

EDA Economic Adjustment Assistance grants have proven instrumental in the development of several major economic development projects in the region, including: construction of the MU Life Science Business Incubator at Monsanto Place, redevelopment of the Kemper Military Academy as an IT training center, Discovery Ridge Research Park development, redevelopment of the former Missouri State Penitentiary site, Ranken Technical College development, and a new revolving loan fund for the region.

The success of EDA funded projects in the region has increased interest in EDA funding in several Mid-MO RPC planning partners. If a situation were to arise where Mid-MO RPC was asked to prioritize projects for EDA funding, Mid-MO RPC would utilize its Board of Directors for EDA project prioritization. The bylaws of the Mid-Missouri Regional Planning Commission allow each county in the region to have three seats on the Board of Directors. One representative from each county is a county commissioner or designee from the county commission. The other two seats are available for appointees chosen by two cities within the county. Cities within each county may petition their county commission to have a representative on the board. Any project prioritization process would use an evaluation matrix to objectively analyze projects under consideration and make a recommendation to EDA which project or projects are most in line with the region's adopted Comprehensive Economic Development Strategy (CEDs).

V. Evaluation Framework

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

Performance Measures

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

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

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

Goal: Create and retain quality jobs in the region

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

Goal: Maintain and develop new infrastructure that will encourage economic development

- Maintain and expand existing transportation network including roads, bridges, rail, ports, airports transit, and pedestrian infrastructure.
- Maintain and expand utility and broadband infrastructure
- Description of regional partnership accomplishments

Goal: Be competitive and prepared for opportunities

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

Goal: Entrepreneurship and small business development

- Evidence of entrepreneurship development through increased entrepreneurship resources
- Reporting on revolving loan fund distribution
- Description of regional partnership accomplishments

Goal: Create a more economically resilient region

- Reporting on resiliency promotion
- Description of regional partnership accomplishments

Goal: Create a region with more equity

- Reporting on equity development efforts
- Description of regional partnership accomplishments

Goal: Create informed communities, citizens, and stakeholders

- Records of informational meetings and written communication
- Description of regional partnership accomplishments

Goal: Maintain and further develop an efficient and effective regional planning commission

- Organizational audit
- Records of professional development activities
- Description of regional partnership accomplishments

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