



A BLUEPRINT FOR OPPORTUNITY
CITY OF LYNCHBURG, VIRGINIA





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CITY OF LYNCHBURG, VA
A BLUEPRINT FOR OPPORTUNITY:
BUILDING TOMORROW'S CITY OF LYNCHBURG

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The City of Lynchburg, Virginia, is one of the best small cities in the country. Driven by innovative businesses and forward-thinking organizations, Lynchburg is a community that values history, natural beauty and healthy, inclusive neighborhoods. Every resident has the opportunity to thrive in the City of Lynchburg.

A BLUEPRINT FOR OPPORTUNITY

Cities are the building blocks of our economy. With their vast resources and opportunities for interaction, today's cities provide a forum for people from all walks of life to innovate and share new ideas. As opportunities for mobility become more plentiful in urban areas, people have flocked to cities at an astonishing rate. In the United States, approximately 85 percent of the population now live and work in cities, which produce 90 percent of the nation's economic output. By 2050, around 70 percent of the world's population will be urban dwellers, according to UN estimates.

While the rise of urban residents has generated a fierce competition for talent and economic development, not all residents prioritize the same characteristics when it comes to choosing a place to live and work. Some move for economic reasons, while others seek places with a unique set of cultural, aesthetic and demographic characteristics. For this reason, attracting talent is about more than demonstrating the potential for economic mobility. It's about building a sense of local identity. Now more than ever, citizens are drawn to communities with individualized atmospheres that befit their preferred way of life.

In smaller cities, the blueprint for opportunity is built on five key principles: identifying industry advantages, filling workforce pipelines, engaging anchor institutions, enhancing quality of place and communicating a city's story to the public. With each principle, cities must strive to promote equity and inclusion, ensuring that all residents have access to opportunity.

Identify Industry Advantages and Grow Local Businesses

Just as citizens often move to a location where jobs are plentiful, so too are companies drawn to areas of economic opportunity. While major corporations tend to gravitate to large, dense cities with a diversity of talent and resources, many smaller companies look for areas that support their industry through local innovation and community engagement. As part of their blueprint for opportunity, small cities must identify the industries that make them unique and contribute the most to local economic development. Cities can then scale their advantages by expanding jobs and resources within these sectors. At the same time, cities must foster entrepreneurship in distressed areas, which can lead to increased mobility for both companies and talent.

Fill Talent Pipelines and Upgrade Workforce Skills

A strong community requires a robust workforce pipeline. In order for companies to thrive, cities must establish a mechanism to engage with and facilitate the success of new talent in the form of internships, job training programs or university collaborations. In fact, research has shown that investing in local talent has a major influence on economic development, giving residents the ability to improve their circumstance. In particular, businesses should invest in key drivers of economic growth, including boomerang talent (those who return to the city where they once lived) and members of the creative class (those who make a living using their minds in professions such as science, engineering, architecture, design, education, arts, law, music and entertainment). These efforts may begin as early as K-12, when students are first exploring career opportunities.

Engage Anchors Institutions as Partners

Much of the blueprint for economic opportunity can be accomplished with the help of local anchor institutions (large tech companies, developers, universities, medical centers and hospitals that quite literally anchor urban centers). As cities look to generate more economic opportunity, they must develop a shared value with their major employers, who wield enormous influence in their communities. By engaging anchors in workforce development, affordable construction, innovation, entrepreneurship and the expansion of public services like transportation, cities can mitigate their divides while making their communities more open and innovative.

Enhance Quality of Place

One of the most important elements of both talent attraction and economic development is quality of place. With today's urban residents forming strong attachments to their local communities, cities must cultivate a distinct identity that caters to new residents. In addition to positioning themselves as welcoming environments to live and work, cities must leverage the amenities and characteristics that make them unique. In fact, research shows that cultural offerings—including bars, restaurants, museums, libraries, parks and bike lanes—are linked to civic satisfaction, well-being and talent attraction. This is especially true in smaller cities, which tend to provide more authentic community experiences.

Tell Your City's Story

The success of each of these initiatives hinges on a city's ability to communicate their story to the public. This begins with crafting a narrative that captures a city's distinct atmosphere, including its strengths, resources and opportunities for advancement. An effective place brand also identifies characteristics that distinguish a city from its neighboring communities. Once a city has defined its brand, it can then broadcast this narrative through digital campaigns, physical advertisements and media coverage.

By incorporating these elements into our blueprint for opportunity, we at the City of Lynchburg can establish a firm sense of place and clearly defined path for attracting and retaining talent. Our new set of guidelines will also leverage the City's current pool of resources to build community and generate sustained economic growth. Through its implementation, our blueprint will transform the City into a coveted destination to live and work, where every resident has an opportunity to thrive.

ENGAGEMENT PROCESS

A blueprint for opportunity is devised by and for the community it serves. While data analysis is important to determining trends, assets and challenges, input from local businesses and employees gives this analysis much-needed context. By providing a platform for community members to share their expertise and new ideas, we hope to generate a universal understanding of economic opportunity among public, private, and governmental partners. This process of convening local stakeholders is reflective of our broader mission to build meaningful relationships between industry players, service providers and anchor institutions. Our conversations with the following groups represent the beginning of a long-term effort to foster community engagement.

To arrive at a firm understanding of the City's many assets and challenges, we at the City of Lynchburg hosted a series of roundtable discussions on a detailed list of topics. Over the course of the interview process, we gave equal voice to public stakeholders, private partners and community service providers. To fortify our efforts, we enlisted Steven Pedigo, a nationally recognized economic development strategy consultant who has advised and collaborated with more than 50 cities, universities, developers, nonprofits and Fortune 500 companies to build more creative, innovative and inclusive communities. Our efforts also tapped into the expertise of the following key players:

Steering Committee. The steering committee consisted of Economic Development Authority (EDA) members, local businesses, major employers, universities and entrepreneurs. The group met monthly to determine the overall direction of the project and offer advice on benchmarks, research conclusions, cluster strengths, target industries, strategy, vision and implementation. As champions of the City's economic development strategy, these members will spearhead its execution alongside the Office of Economic Development and Tourism and other City departments.

City Council and the Economic Development Authority. Conversations with the Lynchburg City Council helped to define the factors influencing today's economic development efforts. The Council also weighed in on the City of Lynchburg's unique challenges as an independent city and helped identify various benchmarks. Moving forward, these leaders will continue to provide input for our economic development strategy and help identify resources needed to support the plan. As elected and appointed community members, they serve as a direct line between the Lynchburg Office of Economic Development and Tourism and the public.

Startup and Entrepreneurship. We met with local entrepreneurs, small business support organizations and founders of local businesses to consider what makes the City of Lynchburg a unique environment for entrepreneurship. In addition to identifying certain action steps, our conversation pinpointed target clusters that have demonstrated the greatest need for talent or capital.

Industry. Our conversation with Lynchburg's leading employers focused on the factors influencing development across industry sectors. In addition to discussing the City's advantages, including its skilled workforce and engaged business community, we addressed various challenges such as a lack of transportation or airport connectivity, insufficient talent pipelines and real estate constraints.

Brian Gain. We met with workforce development professionals, K-12 educators, local employers and members of the creative class to discuss what makes City of Lynchburg an appealing place to live and work. Our conversation centered on methods of talent attraction and retention, particularly with regard to creating "boomerang" citizens (those who return to the city where they once lived). Additionally, we focused on ways to improve Lynchburg's skills pipeline by connecting local businesses to workforce development opportunities.

Tourism and Placemaking. Our tourism and placemaking session convened tourism officials, Destination Marketing Organization (DMO) representatives, restaurant owners, historical site operators, recreation companies and downtown promoters. Together, they discussed how to leverage Lynchburg's "quality of place" assets to drive economic development. Participants also addressed obstacles to making Lynchburg an ideal destination for tourists.

Neighborhoods and Urban Renewal. Our conversation on neighborhoods and urban renewal convened local real estate professionals, community developers and planners, and community advocates. Their discussion recognized City of Lynchburg as a collection of neighborhoods that requires a strategy for inclusive prosperity, which prioritizes the needs of all citizens.



STAKEHOLDER INTERVIEW THEMES

Our participants and stakeholders identified the following recurring themes. Their takeaways are reflected in the City of Lynchburg's overall city building strategy.

Independent City. As an independent city (one that falls outside the territory of another local government entity), the City of Lynchburg is uniquely positioned to take charge of its own economic future. However, due to the Commonwealth of Virginia's "Dillon Rule," major policy changes are constrained by legislative authority. One of Lynchburg's biggest barriers to growth is a lack of available greenfield space or the ability to annex, which forces development strategies to focus on redevelopment and reuse.

Startups vs. Small Businesses. The City of Lynchburg's existing support for small businesses is predominantly focused on local sectors with limited economic impact, such as retail or food service. In order to develop a growth strategy for the City's workforce, it is important to distinguish between these local businesses and scalable startups, which spur innovation, attract major investment and jumpstart a city's economic development. Startups require a different type of support from the City that focuses on convening local entrepreneurs and fostering collaboration. As part of this effort, the City should prioritize engagement with local universities, which can offer both resources and talent.

Eds and Meds. The City of Lynchburg must strengthen its relationships with educational institutions, hospitals and medical centers (so-called "eds and meds"). Not only do these organizations wield enormous influence on a city's economy, but they are also major holders of real estate. As the City endeavors to connect its academic and non-academic community, it must enlist local anchor institutions to help drive economic development.

Existing Businesses. Rather than set its sights on attracting major corporations, the City of Lynchburg can utilize its existing talent in the form of small businesses and startups. By leveraging these local assets, Lynchburg can support opportunities to grow the supply chains of its existing companies. This allows the City to drive economic expansion while being prudent with its allocation of resources.

Airport Connectivity. Businesses, residents and visitors all rely on Lynchburg Regional Airport for access and connectivity. By adding a second carrier to its air service, the City can improve accessibility to and from the region. Although Lynchburg's businesses may be accustomed to dealing with a lack of airline transportation offerings, new businesses will benefit immensely from increased connectivity to other areas, while existing businesses may be more likely to invest locally.

Skill Development. Although Lynchburg is already home to a highly skilled workforce, the City should focus on increased coordination between the private sector, workforce developers, higher education partners and K-12 educators to improve its skills pipeline. In particular, these groups should focus on forming strategic connections, seizing opportunities for outreach and enlisting local talent. At the same time, the City and its partners must demonstrate to students and potential workers that there is career potential within its traded sector industries.

More Students and Businesses Needed Downtown. With a walkable urban core and growing share of restaurants and arts and cultural venues, the City of Lynchburg's downtown area is transforming into a wishlist for the creative class (workers in science and engineering, architecture and design, education, arts, music, and entertainment whose economic function is to create new ideas, technology and creative content). As the City's population grows and becomes more attractive to millennial workers, public and private investments have become even more critical to downtown development. The City of Lynchburg now requires a curated strategy for attracting more residents and workers to its downtown, including banners, community events and placemaking initiatives.

Place-Based Assets. The City of Lynchburg's place-based assets, including but not limited to its proximity to the Blue Ridge Mountains and James River, will prove critical to its economic development. Beyond recognizing its strong quality of place, the City can communicate the story of its beauty and history to the public. Developing a cohesive narrative around its geography and historic sites will allow Lynchburg to attract more tourists, visitors and talent who will come to think of the City as a coveted destination.

Visitor Experiences. As a complement to its natural beauty and rich history, the City of Lynchburg must continue to invest in assets that appeal to tourists, such as food, recreation and culture. Moving forward, the City's ability to attract more visitors will depend on its ability to create authentic experiences that go beyond trade shows and marketing brochures.

Competitive Identity. The City of Lynchburg benefits from a number of individual advantages. But, in order to be competitive with other small- and mid-size cities, it must develop a coherent and competitive identity. Part of this strategy involves crafting a compelling narrative, or pitch, that highlights specific assets. Rather than waiting for this narrative to form organically, both the City and its partners are responsible for communicating a strong place brand to the public.

Inclusive Prosperity. In order to position itself for sustained economic growth, the City must remain committed to improving the skills and well-being of all citizens, including service and blue-collar workers and those not currently participating in the job market. As Lynchburg continues its efforts to reduce local poverty, the City must consider how to drive investment in distressed communities and low-income neighborhoods.

KEY DEMOGRAPHICS & ECONOMIC SNAPSHOT

The following information provides a current snapshot of economic conditions in the City of Lynchburg, which help to determine strategic actions. While these data points help to gauge whether Lynchburg is achieving its overall goals, the data should be updated annually to reflect the City's progress.

BENCHMARK COMMUNITIES

The City of Lynchburg has identified ten benchmark communities that compare to the City in terms of their demographic makeup. Benchmarks were selected based on following criteria:

- Similar in Size.** Selected communities have a population size that is similar to Lynchburg's nearly 80,000 residents.
- Presence of an Anchor Institution.** The City of Lynchburg benefits from the presence of higher education institutions like Liberty University, the University of Lynchburg, Randolph College, Central Virginia Community College, and others. Selected communities house an anchor institution such as a university, hospital, or medical center.
- Proximity to a Metro Area.** Like the City of Lynchburg, selected communities are situated in relatively close proximity to a metropolitan area without being located in the metro itself. In Lynchburg's case, the City is a two-hour drive to Richmond and a three-and-a-half-hour drive to Washington, D.C. (the closest large metro with more than one million residents).
- Outdoor Amenities.** Just as the City of Lynchburg benefits from 17 parks and more than 40 miles of trail for walking, biking or running, selected communities contain a wealth of outdoor amenities.
- Cultural or Heritage Sites.** Selected communities contain cultural or heritage sites, such as Lynchburg's Monument Terrace or Court House Museum.
- Economic Makeup.** Selected communities have a similar breakdown of income, talent and industries. In Lynchburg's case, this includes a median household income of \$41,000 annually and a significant number of healthcare, retail and food services companies.

The following is a selected list of benchmarks

Asheville, NC	Greenville, SC
Bend, OR	Portland, ME
Charlottesville, VA	Reading, PA
Chattanooga, TN	Roanoke, VA
Fort Collins, CO	Savannah, GA

Data helps tell the story of our city. After taking a hard look at our strengths and weaknesses, we uncovered numerous opportunities for growth. While the City of Lynchburg inevitably faces some obstacles to prosperity, its economic foundation is solid and its workforce is becoming more skilled and dynamic by the day. The following assessment looks at these assets and challenges in comparison to Lynchburg's benchmark communities. The assessment is based on more than 65 different metrics, including demographic and socioeconomic trends, diversity, equity, business climate, workforce skills, and education. **(See appendix for a full list of metrics.)** Here are some of our key findings.

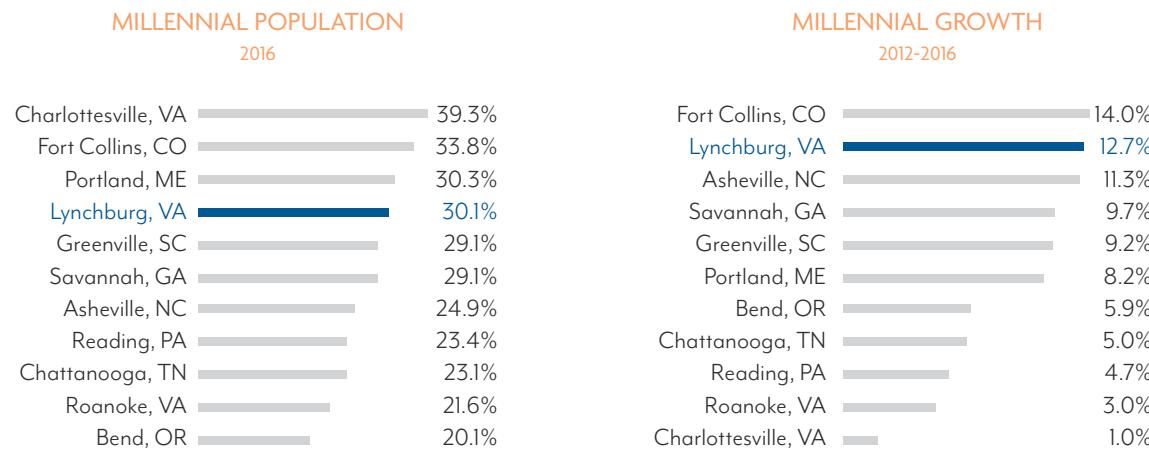
POPULATION TRENDS



With a total of 78,000 residents and an annual population growth of 4 percent, Lynchburg ranks eighth among its fellow benchmark cities. This ranking places the City behind Charlottesville, Virginia (5.4 percent), but ahead of Roanoke, Virginia (2.7 percent), both of which are located nearby. In the last year alone, more than 14 percent of Lynchburg's population moved from a different county, state or country, giving Lynchburg a second place ranking among its benchmark cities. Only Charlottesville ranked higher, with a population growth of 19.2 percent.

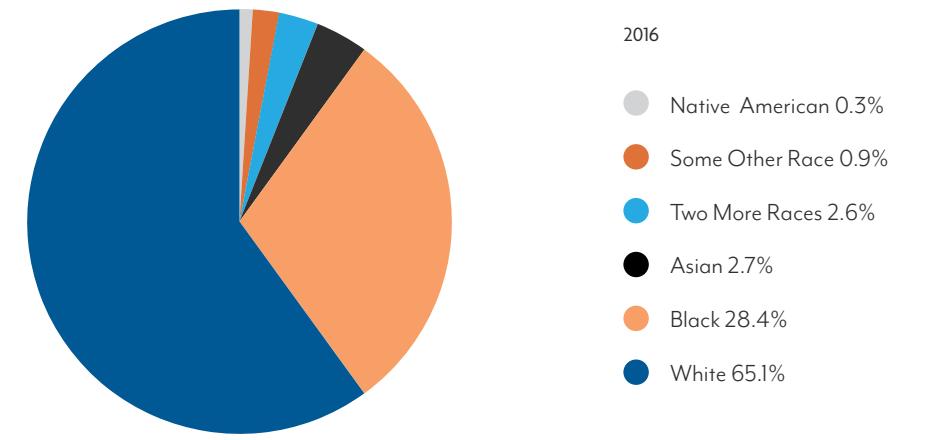
MEDIAN AGE

20-34 YEARS OLD



Millennials make up more than 30 percent of the City of Lynchburg's population. From 2012 to 2016, the City's share of millennials grew by 13 percent, giving Lynchburg the second highest spike in millennial residents among benchmark cities. Today, the City's share of millennials is 45 percent larger than the U.S. average, but relatively similar to the shares in Fort Collins, Charlottesville and Portland, Maine.

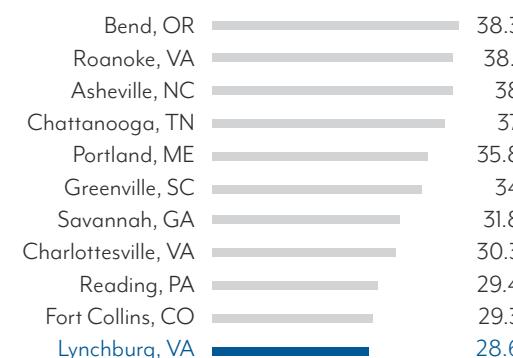
ETHNIC & RACIAL MAKE-UP



The City of Lynchburg consists largely of white and black residents, with white residents making up 65.1 percent of the City's population and black residents making up 28.4 percent. Less represented demographics such as Asians and Hispanics make up just 2.7 percent and 3.3 percent of the population, respectively.

MEDIAN AGE

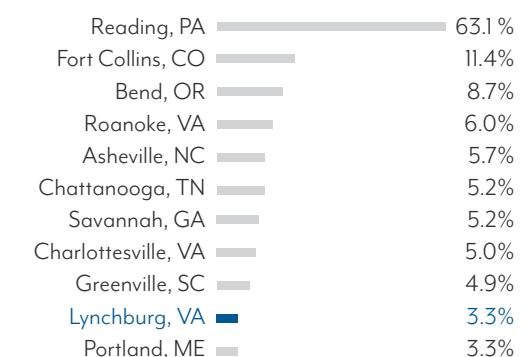
2016



Of all the benchmark cities, the City of Lynchburg has the youngest overall population, with a median age of 28.6 compared to 30.3 in Charlottesville and 38.1 in Roanoke.

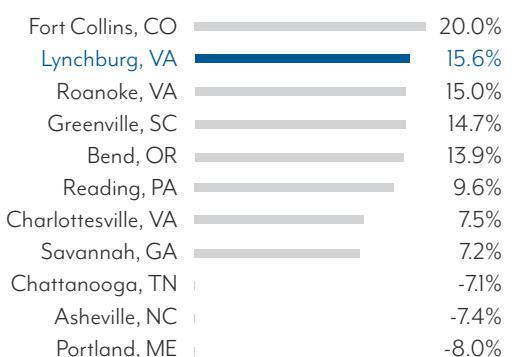
HISPANIC POPULATION

2016



POPULATION GROWTH

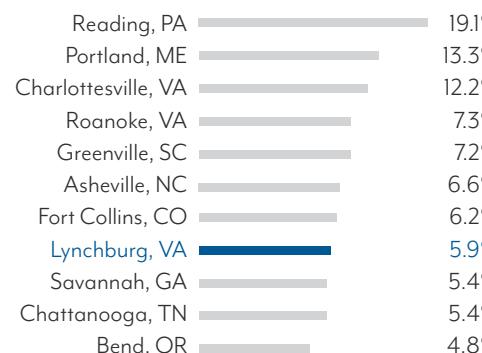
2012-2016



Compared to other benchmark cities, the City of Lynchburg has the second smallest Hispanic population (3.3 percent), ranking far behind Charlottesville (5 percent) and Roanoke (6 percent). That said, Lynchburg's Hispanic population has seen the second highest growth among benchmark cities, increasing by 15.6 percent in the past five years. Only Fort Collins ranks higher, with a growth rate of 20.2 percent.

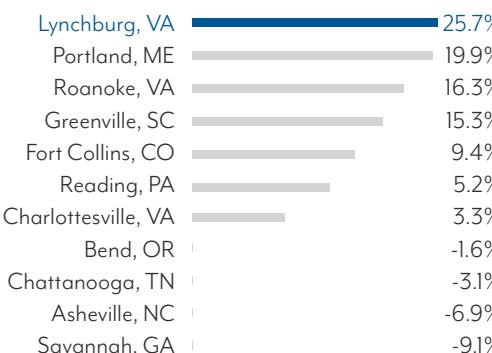
FOREIGN-BORN RESIDENTS

FOREIGN-BORN POPULATION
2016



The City of Lynchburg ranks eighth among benchmark cities according to its share of foreign-born residents (5.9 percent). This share is half the U.S. average, placing City of Lynchburg on par with Fort Collins (6.2 percent), Savannah, Georgia (5.4 percent), and Chattanooga, Tennessee (5.4 percent). Lynchburg also ranks first among benchmark cities according to the growth of its foreign-born population (25.7 percent). This rate is likely to increase as Lynchburg strengthens its identity as a college town.

FOREIGN-BORN GROWTH
2012-2016

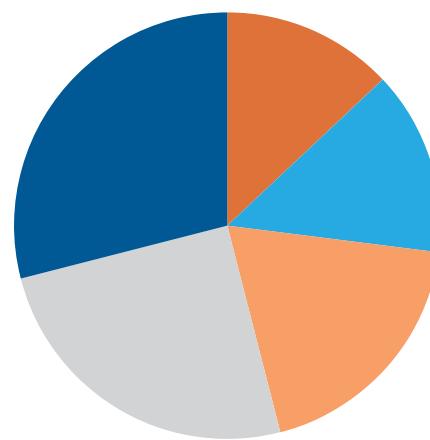


Another third of the City of Lynchburg's workforce has an associates or some college degree, placing the City fifth among its peers. This share is comparable to that of Roanoke (30.5 percent), Fort Collins (28 percent), and Chattanooga (30.8 percent). In the last five years, the number of Lynchburg residents with an associates or some college degree has increased by 8 percent, with the City ranking fifth among its fellow benchmarks.

A similar share of Lynchburg residents (33 percent) have a bachelor's degree or higher. Although Lynchburg ranks seventh on this metric—on par with Chattanooga (27.8 percent), Savannah (27.7 percent), and Roanoke (22.9 percent)—its share is relatively low for a college town. Other “college towns” among the benchmark set, such as Charlottesville or Fort Collins, have shares that are well above 40 percent. In the last five years, Lynchburg's share of residents with a bachelor's degree or higher has increased by 9 percent, placing it eighth among benchmark cities. Most of this growth can be attributed to the increase of residents with a graduate degree (19 percent), as opposed to those with a bachelor's (3 percent).

Each year, Lynchburg's higher educational institutions confer around 18,000 degrees (including those that were completed online). This places Lynchburg first among benchmark cities, although the results are likely influenced by the large online student population at Liberty University.

EDUCATIONAL ATTAINMENT



- 2016
- No High School 11.8%
 - Graduate Degree 13.7%
 - Bachelor's Degree 19.6%
 - High School Diploma 25.5%
 - Some College or Associates Degree 29.4%

Twelve percent of the City of Lynchburg residents do not have a high school diploma. The City ranks sixth among its peers on this metric, in line with Greenville, South Carolina (11.8 percent), and Savannah (13.5 percent). In the last five years, Lynchburg's share of residents without a high school diploma has decreased by nearly 20 percent, placing it second among benchmark cities, just behind Asheville, North Carolina (21.4 percent).

INCOME & HOUSING

MEDIAN HOUSEHOLD INCOME
2016

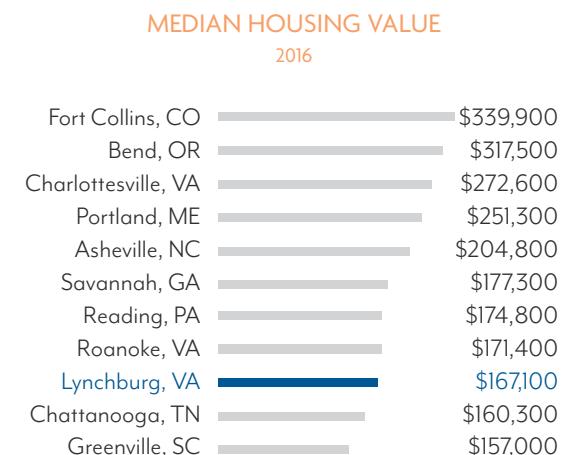
Fort Collins, CO	\$57,831
Bend, OR	\$55,625
Charlottesville, VA	\$50,727
Portland, ME	\$48,259
Greenville, SC	\$45,360
Asheville, NC	\$44,946
Chattanooga, TN	\$41,278
Lynchburg, VA	\$40,728
Roanoke, VA	\$39,201
Savannah, GA	\$37,108
Reading, PA	\$27,247

HOUSEHOLD INCOME GROWTH
2012-2016

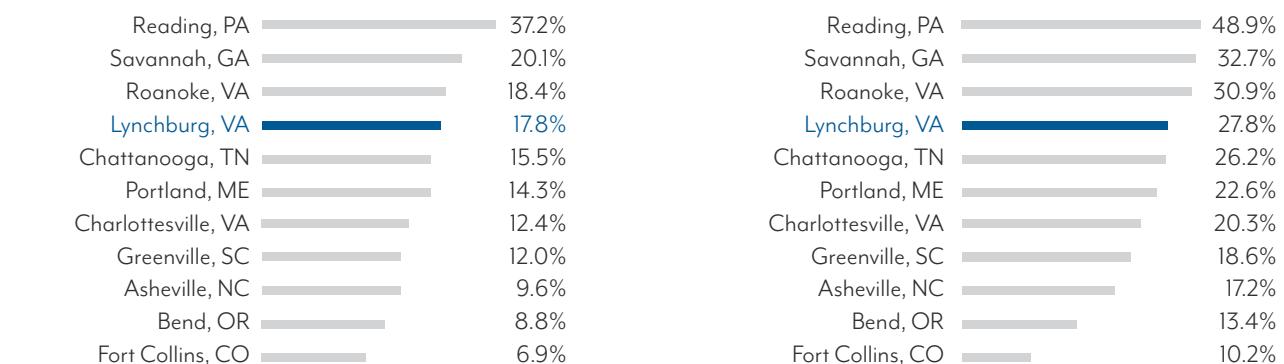
Charlottesville, VA	13.9%
Chattanooga, TN	11.1%
Greenville, SC	9.2%
Portland, ME	8.5%
Fort Collins, CO	8.4%
Lynchburg, VA	7.8%
Savannah, GA	6.4%
Asheville, NC	6.2%
Bend, OR	5.7%
Roanoke, VA	2.4%
Reading, PA	0.2%

With a median household income of approximately \$41,000 annually, the City of Lynchburg ranks eighth among benchmark cities, on par with Chattanooga (\$41,278) and Roanoke (\$39,201). In the last five years, the City's median household income has increased by 8 percent—nearly triple the growth rate of Roanoke (2.4 percent), but half the pace of Charlottesville (13.9 percent). During this time, Lynchburg's male population has seen its wages increase by an average of 5 percent, while its female population has experienced a 1 percent decrease in wages. On average, men in Lynchburg earn approximately \$10,000 more than women.

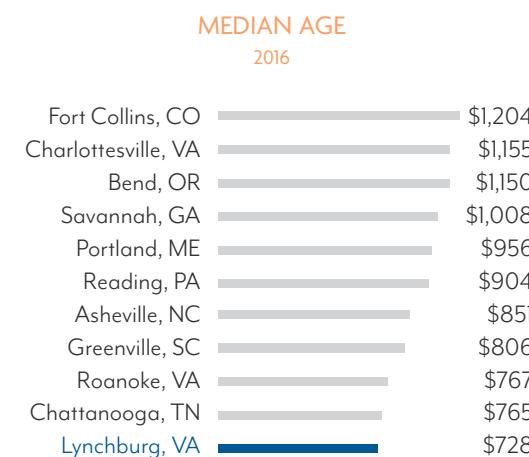
EQUITY



The City of Lynchburg's median housing value (\$167,000) is also the third lowest among benchmark cities. More than a quarter of households with mortgages in Lynchburg spend more than 30 percent of their monthly income on housing. This places the City on par with Fort Collins (25 percent), Charlottesville (24.8 percent), and Chattanooga (24.8 percent).

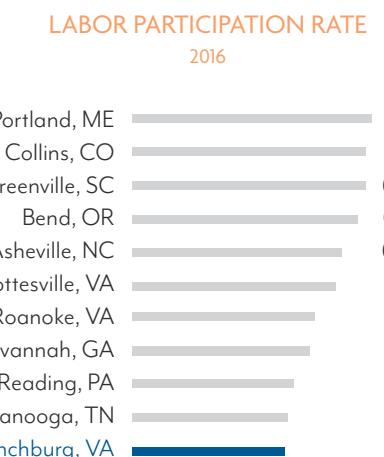


The City of Lynchburg ranks eighth among benchmark cities according to its share of impoverished residents, with nearly 18 percent of Lynchburg families living below the poverty line. Only three benchmark cities—Reading, Pennsylvania (37.2 percent), Savannah (20.1 percent) and Roanoke (18.4 percent)—have higher poverty rates. Lynchburg also ranks eighth according to its share of families with children that live below the poverty line (27.8 percent).



By comparison, the City of Lynchburg has the lowest median gross rent (\$728 monthly) among benchmark cities, with 44 percent of its renters spending more than 30 percent of their monthly income on housing.

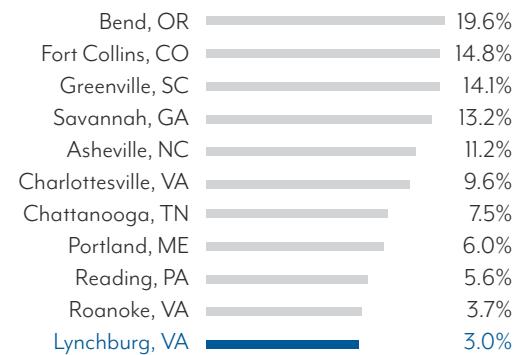
EMPLOYMENT TRENDS



Lynchburg's labor pool is comprised of 38,000 residents, with nearly six in ten active participants in its workforce. This share is the lowest of the benchmark cities, ranking far behind Fort Collins and Portland, whose shares are more than 70 percent.

EMPLOYMENT GROWTH

2010-2015

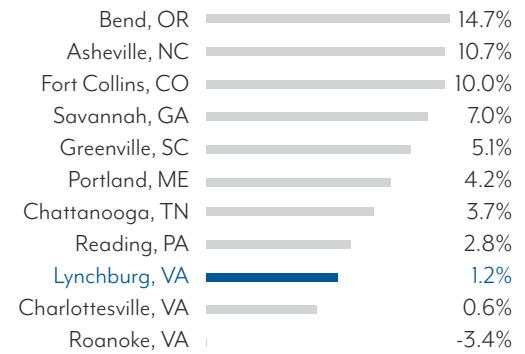


In the last five years, Lynchburg's regional employment base has increased by just 3 percent—less than a third of the growth in Charlottesville (9.8 percent).

EMPLOYMENT TRENDS

TOTAL BUSINESS ESTABLISHMENTS

2010-2015



The number of business establishments in Lynchburg increased by just 1.2 percent in the last five years. While this share puts the City ahead of Charlottesville (0.6 percent) and Roanoke (-3.4 percent), Lynchburg still ranks ninth among its fellow benchmark cities. In total, around 17 percent of Lynchburg businesses are involved in retail trade, accommodation and food service. Another 15 percent are involved in healthcare and educational services, and around 9 percent are involved in professional services.

Lynchburg's share of traded sector businesses (26 percent) is smaller than the U.S. average, ranking behind every other benchmark city except for Greenville. Although Lynchburg's share of high-tech businesses is 27 percent smaller than the national average, the City's share of high-tech manufacturing companies is 10 percent larger, ranking fourth among benchmark cities.



TARGET INDUSTRY CLUSTERS & TALENT BASE

The term “industry cluster” refers to a group of similar and related traded sector businesses in a defined geographic area. Businesses in the same cluster tend to share common markets, technologies and skill sets, and are often connected through buyer-seller relationships. For this reason, industry clusters tend to be highly specific. Instead of categorizing certain businesses as “high-tech,” for instance, an appropriate cluster name refers to the individual product being manufactured or sold (i.e. “software or computer and electronics”). This allows a city to identify the cluster’s unique workforce and supply chain needs, while promoting the cluster more effectively.

On the most basic level, industry clusters promote two functions: collaboration and competition. Due to their shared resources and markets, businesses in the same industry cluster can collaborate to solve issues within their own industry or throughout the broader community, including infrastructure needs and regulations such as incentives or zoning. Industry clusters also help to distinguish a community from nearby areas, define its role in the regional or national landscape, and encourage the development of new business opportunities. At the same time, these clusters encourage competition among related businesses, thereby promoting innovation.

By highlighting a specific group of like-minded businesses, cities can better communicate their competitive strengths to outside talent and firms. Through data analysis, we have identified the following key industry clusters that help drive the City of Lynchburg’s economy:

- Metals and Machinery Manufacturing and Conveyor Systems, and Moving Equipment**
- Wireless Communication and Electronic Components**
- Nuclear Technology**
- Advertising, Marketing, and Design Services and Architecture and Engineering Services**
- Largest “Traded Sector” Employers**

Lynchburg’s unique infrastructure, assets and companies help to support the above industries. But there is more that the City can do to improve workers’ skills within industry clusters. For one, the City of Lynchburg can partner with local businesses, universities and other anchor institutions to create talent and workforce development pipelines for local residents. The City can also encourage site expansion and redevelopment by removing barriers to construction and identifying opportunities for strategic support.

One of the key indicators of an industry’s strength is its location quotient, or LQ. This metric is determined by dividing an industry’s share of the regional total for a given economic statistic (earnings, GDP by metropolitan area, employment, etc.) by the industry’s share of the national total for the same statistic. For example, an LQ of 1.0 in manufacturing means that the region and the nation are equally specialized in manufacturing, while an LQ of 1.8 means that the region has a more concentrated manufacturing cluster than the rest of nation. This data allows the City to build upon its existing economic foundation and attract new businesses, which demand quantifiable evidence of a strong workforce and industry base in the region.

The following is an analysis of the City of Lynchburg’s cluster advantages and associated workforce skills. Working on behalf of the City, the Office of Economic Development and Tourism will use this research and data to drive our ongoing business retention and recruitment efforts.

METALS & MACHINERY MANUFACTURING & CONVEYOR SYSTEMS, & MOVING EQUIPMENT

OVERVIEW

As the home of companies like U.S. Pipe, L&R Precision Tooling and Banker Steel, the City of Lynchburg has a storied legacy and sustainable future for Metals and Machinery Manufacturing. While other areas across the country struggle to preserve a viable production sector, Lynchburg has maintained its competitive advantage. Not to mention, the community has built a reputation for combining traditional manufacturing with advanced capabilities, as demonstrated by its growing expertise in the development of Conveyor Systems and Moving Equipment, led by the likes of Automated Conveyor Systems, Inc., and Alliance Industrial Corporation. As the analysis below indicates, the City of Lynchburg has a skilled talent base from which to draw expertise. As these legacy industries change, the City and its private and public partners must continue to expand this cluster by developing a skills pipeline.

DEFINING THE CLUSTER

Our analysis used the following NAIC codes to define the cluster:

- Fluid Power Cylinder and Actuator Manufacturing (333995)
- Iron Foundries (331511)
- Fabricated Structural Metal Manufacturing (332312)
- Cutting Tool and Machine Accessory Manufacturing (333515)
- Metal Window and Door Manufacturing (332321)
- Sheet Metal Work Manufacturing (332322)
- Electroplate/Pat/Polish/Anodizing Coloring (332813)
- Machine Shops (332710)
- Conveyor and Conveying Equipment Manufacturing (333922)

COMPETITIVE ADVANTAGES AND KEY TAKEAWAYS

Our analysis of the City of Lynchburg's Metals and Machinery Manufacturing and Conveyor Systems and Moving Equipment cluster yielded the following key takeaways:

- A legacy traded, but growing cluster. Both a strength for the City of Lynchburg and a target sector for the Lynchburg Regional Business Alliance.
- Associated with pathway opportunities such as on-the-job skills training and employee benefits.
- Offers a continued means of building family-supporting jobs in the City.
- An estimated 17 Metal and Machinery firms, with a firm LQ of 2.89, or nearly three times the national average.
- Lynchburg experienced a loss of three Metal and Machinery firms in the past five years. Provides an opportunity for business retention, support and expansion within this cluster.
- Cluster consists of nearly 870 workers with an employment LQ of 17.27, or 17 times the U.S. average. Although firm growth has declined slightly, employment grew 7.8 percent from 2012-2017.
- Consistent number of firms offering Conveyor Systems and Moving Equipment Manufacturing expertise (4 firms over the past five years), with a firm LQ of 4.44.
- More than 434 workers employed in Conveyor Systems and Moving Equipment—an increase of 14.8 percent since 2012.
- In addition to Conveyor Systems and Moving Equipment, specializations for this target sector include: Fluid Power Cylinder and Actuator Manufacturing (LQ 42.75), Iron Foundries (12.42), Fabricated Structural Metal Manufacturing (4.70), Cutting Tool and Machine Accessory Manufacturing (1.42), and Machine Shops (1.76).
- Robust business engagement and retention program offers insight into how this sector might lend expertise to a growing Nuclear Technology cluster, or other sectors requiring industrial

SKILLED WORKFORCE

The City of Lynchburg's Metals and Machinery Manufacturing and Conveyor Systems and Moving Equipment cluster will need to draw upon skilled manufacturing and production talent:

- Approximately 2,100 Lynchburg workers have the foundational manufacturing and production skills needed to participate in this cluster.
- Lynchburg's manufacturing skill base is 42 percent larger than the U.S. average.
- The cluster's talent base is expected to maintain steady employment from 2017 to 2023.
- On average, workers with manufacturing skills earn \$39,500 annually.
- Education levels required for this cluster include a high school diploma and technical training.

WIRELESS COMMUNICATION & ELECTRONIC COMPONENTS

OVERVIEW

The City of Lynchburg's Wireless Communication and Electronic Components cluster boasts strong specializations in electronic components development, circuit board production and wiring manufacturing. As such, the cluster plays a critical role in developing the technology and infrastructure needed to support IT and wireless communications. Firms such as Harris Corporation and Innovative Wireless Technologies offer a foundation for the City to grow its presence and expertise in this sector by identifying additional suppliers and complimentary companies. Likewise, the City has a strong engineering, electronic technician and components skills base to fuel the growth of this sector.

DEFINING THE CLUSTER

Our analysis used the following NAIC codes to define the cluster:

- Computer Terminal and Other Computer Peripheral Equipment Manufacturing (334118)
- Power Distribution and Specialty Transformer Manufacturing (335311)
- Current-Carrying Wiring Device Manufacturing (335931)
- Printed Circuit Assembly (Electronic Assembly) (334418)
- Bare Printed Circuit Board Manufacturing (334412)
- Telecommunications Resellers (517911)
- Other Industrial Machinery Manufacturing (333249)
- Other Electronic Component Manufacturing (334419)
- Industrial Design Services (541420)
- Data Processing, Hosting, and Related Services (518210)
- Electrical Contractors and Other Wiring Installation Contractors (238210)
- Computer and Computer Peripheral Equipment and Software Merchant Wholesalers (423430)
- Other Electronic Parts and Equipment Merchant Wholesalers (423690)

COMPETITIVE ADVANTAGES AND KEY TAKEAWAYS

Our analysis of the City of Lynchburg's Wireless Communication and Electronic Components cluster yielded the following key takeaways:

- With an estimated 33 firms and an LQ of 1.84, the cluster exceeds the U.S. average by 84 percent, indicating a strong competitive advantage.
- Firm formation has been limited, adding just one firm from 2012 to 2016.
- Employs nearly 1,200 workers, with an LQ that is 9 times the national average.
- Specific competitive advantages, despite its small firm count. Boasts a large number of specializations, including: Computer Terminal and Other Computer Peripheral Equipment Manufacturing (LQ 7.42), Power, Distribution, and Specialty Transformer Manufacturing (25.05), Printed Circuit Assembly (4.53), Bare Printed Circuit Board Manufacturing (3.32), Other Industrial Machinery Manufacturing (6.35), and Other Electronic Parts and Equipment Merchant Wholesalers (5.84).
- Data analysis suggests the sector's strongest capability lies in electronic components production and circuit board manufacturing and assembly. This insight should be confirmed through company visits.

SKILLED WORKFORCE

The City of Lynchburg's Wireless Communication and Electronic Components cluster will need to draw upon skilled engineering, electronics, and production talent:

- An estimated 4,100 Lynchburg workers have the foundational skills needed to participate in the Wireless Communication and Electronic Components cluster.
- Strong talent advantages in electrical engineering (3.29), industrial engineering (1.58), electronic and electrical drafting (3.54), semiconductor processing (1.63), and electronics assembly (2.34).
- Lynchburg's electronic components skill base is 20 percent larger than the U.S. average.
- The cluster's talent base is expected to grow 6.6 percent from 2017 to 2023.
- On average, workers with skills for this section earn \$54,000 annually.
- Education levels required for this cluster include a college degree, high school diploma and technical training.

NUCLEAR TECHNOLOGY

OVERVIEW

With firms such as Framatome and BWX Technologies headquartered in the City, Lynchburg is the leading nuclear technology cluster in the U.S. The Lynchburg area has a storied history of nuclear technology capability, starting with the original Babcock & Wilcox (B&W) facility opening in 1955. Decades later, Framatome (formerly AREVA) and B&W jointly opened the Operational Center of Excellence for Nuclear Products and Services in North America. In 2015, Babcock and Wilcox founded BWX Technologies to focus on nuclear operations. As nuclear technology and innovation forms a larger impact on alternative power generation, biotechnology, cybersecurity, and other sectors, the opportunity to grow and expand Lynchburg's nuclear technology sector is substantial. Not to mention, the sector has the potential to enhance Lynchburg's brand and competitive identity by associating the City with innovation and emerging technologies.

DEFINING THE CLUSTER

Our analysis used the following NAIC codes to define the cluster:

- Power Boiler and Heat Exchange Manufacturing (332410)
- Power, Distribution, and Specialty Transformer Manufacturing (335311)
- Engineering Services (541330)
- Other Scientific and Technical Consulting Services (541690)
- Power and Communication Line and Related Structures Construction (237130)
- Other Heavy and Civil Engineering Construction (237990)

COMPETITIVE ADVANTAGES AND KEY TAKEAWAYS

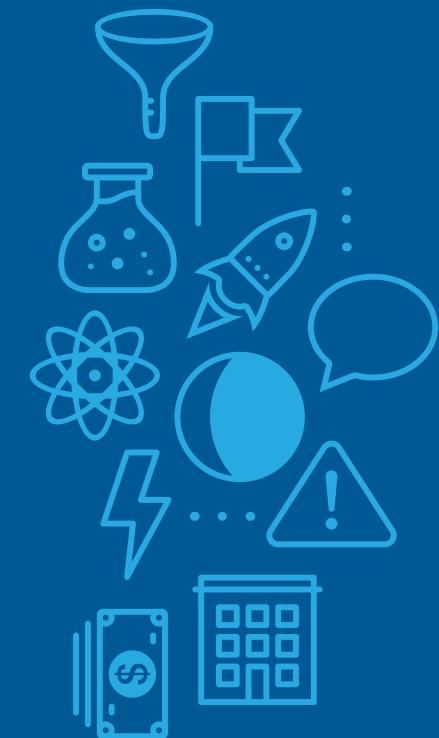
Our analysis of the City of Lynchburg's Nuclear Technology cluster yielded the following key takeaways:

- Strong export cluster with the potential to position Lynchburg as a center for new and emerging technologies.
- Approximately 27 firms with similar capabilities or suppliers. With an LQ of 1.34, the cluster is 34 percent greater than the U.S. average.
- The Office of Economic Development and Tourism should refine the cluster definition through company visits, industry conferences, and roundtable discussions.
- Around 2,200 workers (nearly 8 times the national average).
- Competitive advantages include: Power Boiler and Heat Exchange Manufacturing (LQ 24.09); Power, Distribution, and Specialty Transformer Manufacturing (25.05); and Engineering Services (4.10).

SKILLED WORKFORCE

The City of Lynchburg's Nuclear Technology cluster will need to draw upon skilled engineering, science and research, software/tech, and power generation talent:

- Nearly 2,000 Lynchburg workers have the foundational skills needed to participate in the City's Nuclear Technology Cluster.
- Strong talent advantages in chemical engineering (LQ 4.70), electrical engineering (3.29), civil engineering (2.61), semiconductor processing (1.63), industrial engineering (1.58), and physics (1.28).
- Lynchburg's electronic components skill base is 85 percent larger than the U.S. average.
- The cluster's talent base is expected to grow approximately 2 percent by 2023.
- On average, workers with skills for this section earn \$60,000 annually.
- Education levels required for this cluster include a college degree and technical training.



ADVERTISING, MARKETING, & DESIGN SERVICES & ARCHITECTURE & ENGINEERING SERVICES

OVERVIEW

The City of Lynchburg has made significant investments in its downtown urban core by improving amenities, attracting anchor developments such as The Virginian Hotel, and adapting and reusing former industrial space for new uses. While many cities across the country have lured software and tech businesses downtown, Lynchburg's Advertising, Marketing, and Design Services and Architecture and Engineering Services cluster serves as a foundation for a unique, urban, creative workforce. Already, companies like 434 Marketing, Wiley Wilson and CJMW Architecture are helping make the City of Lynchburg a dynamic place to live and work. We anticipate that the sector's entrepreneurs and workers will continue to be drawn to Lynchburg's cultural amenities, walkable downtown core and opportunities to connect—all of which position the City as an exciting hub for creative professionals.

DEFINING THE CLUSTER

Our analysis used the following NAIC codes to define the cluster:

- Architectural Services (541310)
- Engineering Services (541330)
- Landscape Architectural Services (541320)
- Direct Mail Advertising (541860)
- Other Services Related to Advertising (541890)
- Media Representatives (541840)
- Graphic Design Services (541420)
- Public Relations Agencies (541820)
- Marketing Consulting Services (541613)
- Other Specialized Design Services (541430)
- Interior Design Services (541410)

COMPETITIVE ADVANTAGES AND KEY TAKEAWAYS

Our analysis of Lynchburg's Advertising, Marketing, and Design Services and Architecture and Engineering Services cluster yielded the following key takeaways:

- Serves as the foundational target cluster for attracting businesses to downtown Lynchburg, leveraging investments made in the urban core.
- An estimated 25 Architecture and Engineering firms operate in Lynchburg—a share equivalent to the national average.
- More than 1,700 workers employed at Lynchburg Architecture and Engineering companies—a share nearly four times the U.S. average.
- Specialization for Engineering Services is four times the U.S. average, while Architecture Services is 25 percent greater. Lynchburg does not have a competitive advantage in Landscape Architectural Services.
- Approximately 233 Advertising, Marketing, and Design firms, with an LQ of 1.42 (42 percent greater than the U.S. average).
- Nearly 260 workers (around 3.5 times the national average) in Advertising, Marketing and Design.
- Competitive advantages in Advertising, Marketing, and Design include: Direct Mail Advertising (LQ 4.20), Other Services Related to Advertising (2.21), Media Representatives (2.10), and Graphic Design Services (1.63).

SKILLED WORKFORCE

The City of Lynchburg's Advertising, Marketing, and Design Services cluster will need to draw upon skilled advertising and marketing professionals and designers:

- Nearly 740 Lynchburg workers have the foundational skills needed to participate in the City's Advertising, Marketing, and Design Services cluster.
- Lynchburg's Advertising, Marketing, and Design Services skill base is equivalent to the U.S. average.
- The cluster's talent base is expected to grow approximately 8.5 percent by 2023.
- On average, workers with skills for this sector earn \$47,000 annually.
- Education levels required for this cluster include a high school diploma, technical training or a college degree.

The City of Lynchburg's Architectural and Engineering Services target cluster will need to draw upon skilled architects, designers, and engineers:

- An estimated 1,515 Lynchburg workers have the foundational skills needed to participate in the City's Architectural and Engineering Services Cluster.
- Lynchburg's architecture and engineering skill base is nearly two times larger than the U.S. average.
- Engineering talent is one of the strongest skill clusters in the City.
- The cluster's talent base is expected to maintain the same number of workers through 2023.
- On average, workers with skills for this sector earn \$77,500 annually.
- Education levels required for this cluster include technical training or a college degree.

LARGEST “TRADED SECTOR” EMPLOYERS

OVERVIEW

In addition to the aforementioned target industry clusters, the Steering Committee wanted to ensure that the City’s major Traded Sector Employers were included as a part of the strategy to grow, expand and retain businesses in Lynchburg. We have grouped the 25 largest Traded Sector Employers (those selling goods and services outside the region) as a target cluster for the City’s economic development efforts.

DEFINING THE CLUSTER

The City of Lynchburg’s 25 largest Traded Sector Employers include:

Aerofin Corporation	Harris, Inc
Automated Conveyor Systems	International Paper
Belvac Production Machinery	J. Crew Outfitters
Bausch & Lomb	KDC Lynchburg
BWX Technologies, Inc.	LSC Communications
C.B. Fleet, A Prestige Brands Company	Mid-Continent Cabinetry
Delta Star, Inc.	Pacific Life
Flowers Baking Company	Parker-Hannifin
Flowserve Corp.	Porters Fabrication
Framatome	Southern Air, Inc.
Frito-Lay, Inc.	Tessy Plastics
Genworth Financial Inc.	Wiley Wilson
Hanwha Azdel	



REAL ESTATE & LAND USE

The City of Lynchburg is an urban center in a rural region. In addition to leveraging its walkable urban core, the City must deploy smart, comprehensive planning to promote redevelopment and reuse, identify geographic challenges, and locate areas for greenfield development.

In the last 20 years, the City of Lynchburg's public and private sectors have invested considerably in its downtown core in the form of new public space and mixed use development. In particular, these sectors have partnered to create coordinated development strategies, resulting in significant investment, revitalized structures, and rejuvenated residential and commercial environments. Since 2002, the City of Lynchburg has invested more than \$50 million in downtown public park and infrastructure projects. This has generated substantial private investment in downtown areas, more than doubling real estate values in the Central Business District.

The City of Lynchburg strives to support a balance between residential and commercial corridors. Recently, the City updated its Comprehensive Plan for 2013-2030 to include additional planning documents for ten individual neighborhoods. To ensure a healthy mix of new development, the City also updated its Zoning Ordinance and Downtown 2040 Master Plan.

As a complement to these efforts, a growing number of the City's commercial buildings are owned by the expanding non-profit sector, which receives a tax-exemption on commercial properties. In recent years, major anchor institutions such as universities and healthcare companies have also begun to purchase large tracts of land for commercial development. Currently, the nonprofit and public sectors control 18 percent of land in the City of Lynchburg.

When it comes to real estate development, the City's biggest strength has also become its greatest challenge. As a historic area with a walkable urban core, Lynchburg is poised to attract a growing share of visitors and new residents. This requires major improvements to its aging infrastructure, including roads, bridges and water lines, which the City is already working to replace. At the same time, Lynchburg benefits from a significant stock of historic buildings, which allow developers to make use of federal and state tax credits. As former industrial or manufacturing sites, many of these older structures qualify as brownfields that may require environmental testing and remediation prior to their redevelopment.

Yet another challenge to redevelopment is the nature of the terrain itself. Although the Blue Ridge Mountains provide a coveted resource for the City, they have also hindered its expansion. As Lynchburg witnesses the growth of its population size and economic development, it struggles to find developable tracts of land for greenfield construction. This uneven terrain has given rise to the nickname "The Hill City."

As the City of Lynchburg attempts to address these challenges through redevelopment, it must strive to preserve both its local character and historic status. Meanwhile, development officials must position the City as a hub for affordable homes and commercial real estate—even when compared to smaller cities nearby.

BUILDING TOMORROW'S LYNCHBURG

5-YEAR STRATEGY 2019 - 2023

The world's economy is changing, but the values and principles of an economically successful community remain the same. The following elements provide a foundation for the City of Lynchburg's economic development objectives over the next five years. With a firm blueprint for attracting talent (the primary driver of economic growth), the City of Lynchburg will stay ahead of changing conditions in the local, regional and international economy.

In addition to being attuned to meaningful impacts in the market, a successful economic development strategy hinges on collaboration between a number of engaged partners and organizations. As new challenges and opportunities arise, Lynchburg's public and private entities must recognize their interdependence and work toward a common set of goals.

This collaboration will require a detailed implementation plan featuring action steps, metrics and assignments for both partners and leaders. By developing a blueprint for the City's broader economic development goals, the City of Lynchburg can identify new areas for the attraction and retention of companies and talent. With a clearly defined implementation plan, the City will better serve its citizens and stakeholders, while generating inclusive economic prosperity.

The City of Lynchburg, Virginia, is one of the best small cities in the country. Driven by innovative businesses and forward-thinking organizations, Lynchburg is a community that values history, natural beauty and healthy, inclusive neighborhoods. Every resident has the opportunity to thrive in the City of Lynchburg.



VALUES

The following values provide a foundation for our strategy and inform the actions and investments needed to support the City of Lynchburg's inclusive and prosperous future.

Honor Legacy and Encourage Innovation. Lynchburg's legacy as a "maker-community" sits at the heart of the City's ethos. A thriving maker community honors its history, but looks to the future and encourages a culture of constant innovation and improvement.

Focus on Family-Wage Jobs. The quality of jobs we create today will impact the prosperity of Lynchburg citizens for generations to come, setting a path for individual self-actualization and family well-being.

Maximize Quality of Place. We value development efforts that prioritize quality of place and leverage the community's cultural and physical assets.

Repurpose and Reuse. As Jane Jacobs once wrote, "New ideas require old spaces." We value and want to protect the character and authenticity of the City of Lynchburg's industrial past, while re-envisioning spaces for new and innovative uses.



Maximize Urban Potential in a Rural Community. As an urban center in a rural region, the City of Lynchburg is rich with competitive advantages and potential, though we recognize its unique land use and infrastructure challenges.

Support Continuous Upskilling. The City of Lynchburg's competitive advantage is its diversity of skills, ideas and talents. In order for Lynchburg to thrive in the future, the City must encourage the ongoing upskilling and training of its workforce and ensure that all citizens have the tools to participate in our economy.

Ensure Inclusive Prosperity. Today's urban challenges require a new strategy centered on inclusive prosperity. For too long, economic development and equity have been seen as separate entities. To encourage sustainable growth in the City of Lynchburg, these priorities can no longer be mutually exclusive. Our strategy ensures that equity and inclusion are reflected in all city building efforts.

Embrace Engagement. We are stronger together when it comes to solving our City's challenges. We are committed to the ongoing engagement of businesses, anchor institutions, community organizations, citizens and elected officials to tackle our toughest economic issues. Our mission relies on key resources such as the National Citizen Survey, industry cluster roundtables, listening sessions with elected officials and expertise of our economic development Steering Committee.



GUIDING PRINCIPLES

The Steering Committee and the City of Lynchburg have outlined seven guiding principles to inform the priorities and objectives of Lynchburg's economic development strategy. These principles will help shape the City's economic development approach to future investment, resource deployment, and strategy implementation.

Industry Cluster-Driven. Adopt a data-informed, traded sector cluster approach, which will guide the following strategy goals, objectives, and actions.

- Grow sectors that provide opportunities for a variety of specializations and competitive advantages, a range of talent and skill levels, and continued business development.
- Prioritize sectors that support family-wage job creation—a key element of inclusive prosperity.
- Focus on the following clusters: Metals and Machinery Manufacturing and Conveyor Systems and Moving Equipment, Nuclear Technology, Advertising and Design, and Architecture and Engineering Services.

Prioritize Existing Businesses. Focus on business expansion and retention, which is a more efficient and effective means of growing the local economic base and attracting additional investment.

- Allocate staff and resources for strengthening relationships with existing Lynchburg companies.
- Prioritize company attraction efforts to support industry cluster growth, including the further development of the supply chain.
- Convene business leaders by cluster to develop relationships and expertise among City of Lynchburg economic development staff regarding competitive advantages and challenges.

Focus on Entrepreneurship and Grow Your Own. Develop a startup ecosystem for scalable traded businesses, especially those within the advertising, architecture, design, and engineering cluster.

- Understand that the needs of scalable export businesses are different from those of local small businesses.
- Celebrate the successes of Lynchburg entrepreneurs, helping to promote a culture and brand for Lynchburg as an emerging startup hub.
- Extend support for businesses beyond the downtown core, ensuring access to entrepreneurship for all residents and neighborhoods.

Leverage and Engage Anchor Institutions. Recognize Lynchburg's anchor institutions—universities, health care institutions and large-scale employers—as critical drivers of the City's economic development efforts.

- Build strategies that utilize the core capabilities, size and scale of anchor institutions to accelerate economic progress and inclusive prosperity.
- Engage and develop partnerships and new collaborations among anchors to further enhance innovation and the commercialization of new products and services, while creating accessible jobs for local residents.
- Position Lynchburg as a learning laboratory where universities, institutions, businesses, entrepreneurs and talent come together to exchange ideas and build community.

Match and Build Skills with Opportunities. Center the City of Lynchburg's economic and workforce development efforts on creating and filling family-wage jobs and in-demand skills in key growth industries.

- Focus on developing workforce pipelines in partnership with local workforce development and education partners, with an emphasis on Lynchburg's target industry clusters.
- Facilitate mutually beneficial and meaningful relationships between education partners, city institutions, and major employers.

A Commitment to Engagement and Results-Oriented Partnerships. Commit to long-term, productive partnerships, which are strengths of Lynchburg's economic development efforts.

- Recognize that inclusive engagement is ongoing and multi-faceted, involving stakeholders—businesses, anchor institutions, community organizations, citizens and elected officials—at all levels.
- Ensure the City of Lynchburg and its economic development priorities are well-represented by the work of the Lynchburg Regional Business Alliance.
- Build and maintain a feedback loop with Lynchburg residents to address changing priorities and needs for economic development.

Promote and Develop Place. Embrace and promote the City of Lynchburg's distinct cultural heritage and natural assets, which make it a desirable destination for talent.

- Promote easy access to the Blue Ridge Mountains, James River, cultural sites and other recreational and tourism amenities that draw visitors from within and outside the region.
- Recognize the City of Lynchburg as a collection of neighborhoods, each with its own identity, assets and challenges..
- Highlight Downtown Lynchburg as a walkable, vibrant urban core, a desirable location for many creative and innovative companies, and an asset for the entire region.
- Communicate to city stakeholders that a thriving, affordable destination with rich amenities such as recreation, retail, quality schools, parks, restaurants and entertainment is essential for talent attraction and retention.

STRATEGY GOALS

The City of Lynchburg is focused primarily on growing its share of traded sector jobs (those that export goods and services outside of their immediate geographic area). This strategy zooms in on five key industry clusters, which are aligned with the City's most competitive talent assets. Outside of these clusters, the City is also focused on developing skills and talent in growing industries such as advertising, design, architecture and engineering. Most importantly, the City aims to create a distinct quality of place, which is critical to attracting new business and retaining talent. In order for these goals to be met, the City of Lynchburg must mandate and measure the actions of its engaged partners.

GOAL 1

EXPAND & SUPPORT LYNCHBURG'S EXISTING COMPANY FOUNDATION.

In addition to traditional and advanced manufacturing industries, Lynchburg is home to a number of knowledge-based industries, which are key drivers of economic growth. As the City's workforce becomes more creative, legacy manufacturing industries can use innovation to adapt to global economic shifts. By integrating technology into its existing businesses, Lynchburg's manufacturing cluster may become more automated and attract a more skilled workforce, allowing manufacturing to remain an essential component of the City's industrial fabric. With a sustained focus on education and skills training, Lynchburg's citizens will gain both technological and manufacturing skills to fill existing and future jobs. This is essential for equitable economic development efforts. Alternatively, the City can recruit companies that meet the industry's changing requirements. The City will remain focused on the following industry clusters, which represent the foundation of Lynchburg's current workforce:

Target Clusters:

- **Metals and Machinery Manufacturing and Conveyor Systems and Moving Equipment**
- **Nuclear Technology**
- **Wireless Technology and Electronic Components**
- **Advertising, Marketing, and Design Services**
- **Architecture and Engineering Services**

GOAL 1

OBJECTIVE

1.1**BECOME INDUSTRY CLUSTER EXPERTS.**

In order to fully understand the five target clusters, the City must surround itself with regional experts and ambassadors who can speak to the current opportunities and challenges. By meeting with local businesses and documenting their insights, staff can present solutions to industry challenges while fostering collaboration with the surrounding community. Lest these efforts become too isolated, the City must also stay attuned to larger national and international trends within the five sectors. In particular, Lynchburg must investigate the common geographic preferences of these industries, and consider how their locations are providing adequate land and buildings to support their expansion. Staff will center their efforts on clusters as opposed to activities, which tend to be more fixed and less responsive to innovation. Due to the shifting nature of the market, staff must also stay open to additional, emerging clusters that might position the City for future economic growth.

Action 1.1.1: Organize staffing assignments around industry clusters, not actions.

Action 1.1.2: Attend and participate in necessary thought-leadership and industry best practice conferences and gatherings.

Action 1.1.3: Develop industry competitiveness studies and development plans for all five target clusters, identifying competitor communities, supply chain needs, competitive advantages, and cluster challenges.

OBJECTIVE

1.2**IMPLEMENT A BUSINESS EXPANSION AND SUPPORT PROGRAM.**

With so many cities focused on attracting new workers, it becomes easy to ignore one of the most important local assets: existing businesses. Today, an estimated 70 percent of all jobs are created through the expansion of local companies. These companies are often equipped with an extensive knowledge of their surrounding neighborhood, eliminating the need to advertise or convince them to broaden their workforce. Most importantly, they are essential players in building inclusive prosperity. Still, any business expansion or support program requires a strategy for making the most out of a company's resources. Instead of developing a one-size-fits-all model for expansion, the City of Lynchburg must consider the needs of individual industry clusters. To accomplish this, the City must engage the private sector in developing a systematic approach.

Action 1.2.1: Organize and engage a business cluster steering committee and industry cluster working groups.

Action 1.2.2: Develop an inventory of Lynchburg businesses' organized employment and tax base, using it to inform, prioritize, and track business visits.

Action 1.2.3: Execute a business visitation plan (for both Lynchburg locations and headquarter operations), identifying employer profiles, high-potential expansion opportunities and supply chain needs.

Action 1.2.4: Identify and create appropriate support programs and initiatives for each cluster, realizing that these will differ depending on the cluster.

GOAL 1

OBJECTIVE

1.3

STRATEGICALLY MARKET AND PROMOTE INDUSTRY CLUSTERS TO GROW SUPPLY CHAINS.

Once industry clusters have been clearly defined, the City of Lynchburg can then proceed to market and promote their strengths. In addition to attracting new talent, this strategy encourages existing businesses to remain in the area and grow their local investment. In order to maintain a clear marketing message, Lynchburg's economic development staff must understand where certain clusters are located geographically and target their promotions accordingly. All promotional materials, websites, policies and advocacy should be consistently focused on cluster development.

Action 1.3.1: Partner with major employers within target sectors to identify potential companies and selected cities for site visits, with the goal of sharing Lynchburg's story.

Action 1.3.2: Create cluster industry marketing profiles and personas. Profiles should be made available in print, presentation and web/electronic format.

Action 1.3.3: Develop and implement a quarterly outbound marketing strategy that defines target audiences by industry and audience group (i.e. area CEOs, anchors, millennial talent).

Action 1.3.4: Ensure the Lynchburg Regional Business Alliance and the City's Marketing and Communications Department have the appropriate marketing materials and direction to fully represent Lynchburg's targeted economic development priorities.

OBJECTIVE

1.4

DEVELOP THE REAL ESTATE, LAND, INFRASTRUCTURE, AND INCENTIVE TOOLS TO SUPPORT BUSINESS EXPANSION.

The City of Lynchburg has cultivated a unique natural and built environment that is ripe for business growth. By investing in brownfield remediation, infrastructure development and greenfield construction, the City can support the expansion of its business sector. As part of this mission, the City must also provide up-to-date, competitive incentives that encourage real estate development and job creation.

Action 1.4.1: Transfer city-owned commercial and industrial space and land to the EDA for management and deployment.

Action 1.4.2: Develop and maintain a plan for the strategic deployment of EDA-owned land and property.

Action 1.4.3: Continue to support the redevelopment of brownfield sites throughout the City with funding support from federal and state programs.

Action 1.4.4: Network across City departments to maintain and enhance quality infrastructure assets.

Action 1.4.5: Continue to audit existing incentive programs, such as the Authority's Job Creation Grant, Capital Investment Grant, Technology Zone, Local Redevelopment Program and Tourism Zone, to ensure they are operating and funded appropriately. When necessary, develop new programs to address gaps and needs.

GOAL 1

OBJECTIVE

1.5

NURTURE A STARTUP ECOSYSTEM AND POSITION THE CITY OF LYNCHBURG AS AN ENTREPRENEURIAL HUB.

People who open businesses tend to do so within a community they know and love, where they have access to local or regional networks and resources. In many cases, traded sector startups are the product of university research or the expansion of an existing industry cluster. While their focus is often local, startups often have a widespread impact. Research indicates that less-than-one-year-old companies have produced an average of 1.5 million jobs per year over the last three decades. Because startups often have a limited number of employees or share of physical space, they require even more access to capital and industry networks. In order to fully support its startup community, the City of Lynchburg must provide these companies with the tools and resources to grow and expand.

Action 1.5.1: Build a community culture and resources that support entrepreneurship in Lynchburg.

Action 1.5.2: Raise awareness of Lynchburg as a destination for startups in Virginia by celebrating successful companies and attending national conferences such as the Tom Tom Founders Festival or SXSW.

Action 1.5.3: Reimagine the Lynchburg Business Development Center, under the leadership of the Office of Economic Development and Tourism.

Action 1.5.4: Develop a neighborhood entrepreneurship plan to extend business support services beyond downtown areas.

Action 1.5.5: Collaborate with city and regional partners to expand Create Lynchburg, a conference for creative small businesses.



GOAL 2

ENGAGE & COLLABORATE WITH CITY ANCHOR INSTITUTIONS

(universities, healthcare institutions, major employers, and large-scale tourism assets)

To achieve more inclusive growth, the City of Lynchburg must engage and collaborate with local anchor institutions (organizations that quite literally anchor urban centers). As some of the largest employers in their communities, anchors wield enormous influence on a city's economic development, from employing local residents to providing workforce pipelines for low-income residents to driving development in downtown areas. In the City of Lynchburg, some of the most prominent anchors include academic institutions such as Liberty University, Central Virginia Community College, Randolph College and the University of Lynchburg; healthcare institutions, such as Centra Health; and a number of tourism assets. By engaging these organizations in economic development, the City can ensure that all residents reap the benefits of Lynchburg's financial growth.

OBJECTIVE

2.1

ENGAGE LYNCHBURG'S ANCHOR INSTITUTIONS ON THE ROLES OF ANCHORS IN ECONOMIC AND COMMUNITY DEVELOPMENT.

Many anchors are unaware of their role in community-building. It is up to the City of Lynchburg to engage these institutions on how to become involved in local workforce and development initiatives. Anchors should also be able to lean on one another and call upon the resources of established institutions with a history of community involvement. By learning from the takeaways of their fellow anchors, new companies can assist in the process of economic and community development.

Action 2.1.1: Develop "how-to" and "why anchors" educational materials to be presented to anchors, local elected officials, and business leaders.

Action 2.1.2: Create and host a "The Role of Anchors" workshop session, followed by quarterly webinars or face-to-face meet-ups.

Action 2.1.3: Convene a "best practices trip" for Lynchburg elected officials, anchor institutions leaders, and economic and workforce development professionals to a community effectively engaging local anchors.

GOAL 2

OBJECTIVE

2.2

DEVELOP AN ANCHOR INSTITUTION ASSESSMENT/GOAL-SETTING TOOL AND FRAMEWORK.

As cities begin to recognize the importance of their anchor institutions, numerous organizations (Initiative for a Competitive Inner City, Democracy Collaborative, CEO for Cities, NYUSPS Urban Lab at the Schack Institute of Real Estate, etc.) have outlined strategies for engaging anchors in economic development. Some of the most important roles for anchor institutions include community building, real estate and workforce development, and driving industry growth. Because anchors serve different purposes, the City must develop an assessment tool that considers the unique assets of its local organizations, including those in tourism and academia. By testing our strategies on a select group of anchors, the City of Lynchburg can determine the types of institutions that are essential to community-building in Lynchburg.

Action 2.2.1: Research and uncover best practices associated with an anchor institution assessment framework.

Action 2.2.2: Select three Lynchburg anchor institutions, representing each of the following: a major employer, university and healthcare institution.

Action 2.2.3: Communicate the successes and challenges identified from Action 2.2.2.

Action 2.2.4: Make appropriate changes and scale the implementation of the assessment tool with other city anchors.

OBJECTIVE

2.3

CONVENE LOCAL ANCHORS TO DEVELOP AN “ANCHOR COLLABORATIVE” WITH CLEAR ECONOMIC & COMMUNITY DEVELOPMENT GOALS.

Anchors are most powerful when they work together to create systematic, widespread change. In recent years, a number of cities have formed anchor collaboratives that allow anchors to pool their resources and establish definitive goals for community development. In Newark, the Newark Anchor Collaborative convenes organizations like Audible, Prudential, and Rutgers University to carry out the City’s “hire, buy, live” agenda. In Cleveland, the Greater University Circle Initiative brings together three major anchors to combat poverty and disinvestment. And in West Philadelphia, Drexel University and the University of Pennsylvania have teamed up to revitalize the City’s former industrial neighborhoods.

Action 2.3.1: Assemble quarterly working roundtable sessions with city leaders, elected officials and senior representatives from local anchor institutions.

Action 2.3.2: Host representatives from successful “anchor collaboratives” from around the country to understand how they operate, set goals, measure progress and hold each other accountable.

Action 2.3.3: Set goals, establish an action plan, identify necessary resources and create metrics to measure progress.

GOAL 2

OBJECTIVE

2.4

POSITION LYNCHBURG AS AN “APPLIED COMMUNITY LAB” THAT SUPPORTS ONGOING LEARNING.

Strong business partnerships help define Lynchburg’s identity as a supportive center for learning. By serving as a laboratory for testing new ideas, technologies and innovations, the City can foster collaboration between students, citizens and local businesses, thereby eliminating certain barriers to economic opportunity. In New York, for instance, the multinational private equity firm Blackstone partnered with NYU and Ideator, an innovation network that promotes community engagement, to create Blackstone LaunchPad, a campus-based entrepreneurship program that supports and coaches aspiring entrepreneurs. These partnerships can be further developed through panels, exhibits, speaker series and other non-credit programming, which will attract new talent from outside the area. One of the most successful examples of these efforts is Campus Philly, a nonprofit organization that hosts meetups between Philadelphia’s higher education institutions and members of key industries.

Action 2.4.1: Build business and anchor partnerships for student projects, experiments, internships and skill development, helping to position the City of Lynchburg as a center for applied practice learning.

Action 2.4.2: Embrace and promote (existing) speaker series, panels, exhibits and non-credit programming.

Action 2.4.3: Develop a city identity and brand for packaging the actions listed in Actions 2.4.1 and 2.4.2.

OBJECTIVE

2.5

UTILIZE ANCHORS TO DRIVE TOURISM DEVELOPMENT.

The City of Lynchburg benefits from the presence of a number of tourism companies, historical sites and cultural assets ranging from the Lynchburg Historical Foundation and Diamond Hill Historical Society, to Old City Cemetery and Thomas Jefferson’s Poplar Forest. The City also has unparalleled access to the outdoors with the Blue Ridge Mountains, Appalachian Trail and the James River close by. While Lynchburg can promote these resources on its own, it must also enlist the help of local anchor institutions, which attract students, parents, visitors, customers and patients to the region. By advertising Lynchburg’s cultural and recreational assets to their network of customers and stakeholders, anchor institutions can help steer the City’s brand and drive its industries forward.

Action 2.5.1: Create a tourism marketing package and pitch, both in digital and print, for anchors to promote to stakeholders, including new students, parents, customers and healthcare patients.

Action 2.5.2: Host a series of tourism promotional events or “tourism experiences” in partnership with area anchors, including colleges and universities. Event will be held during welcome student weeks, parent’s weekend and alumni weekends to promote the City’s quality of place and cultural, historical and recreational amenities.

Action 2.5.3: Grow and develop the City’s sports tourism marketing and meeting and group sales efforts by coordinating with area colleges and universities.

Action 2.5.4: Coordinate with regional and city partners to improve access to the James River, helping to drive the development of recreational amenities.

Action 2.5.5: Redefine the James River Arts and Cultural District program to support catalytic, high impact projects.

Action 2.5.6: Develop growth and staffing plans for the Lynchburg Museum System and Lynchburg Visitors Center.

GOAL 3

SUPPORT TALENT & IN-DEMAND SKILL DEVELOPMENT FOR LYNCHBURG'S TARGET INDUSTRY CLUSTERS.

A diverse, highly-skilled workforce is an important asset for any urban community. In order to weather the inevitable booms and busts of the modern economy, the City of Lynchburg must provide skills training and pathways to job opportunities within the City's target industry clusters. While this will not eliminate income stratification or workforce skills gaps, it will allow individual residents to achieve their full economic potential, thereby improving the City's fiscal growth and stability.

OBJECTIVE

3.1

FOSTER ONGOING SKILL DEVELOPMENT FOR THE CITY OF LYNCHBURG'S EXPORT SECTORS.

Lynchburg's skills and training programs must align with its target clusters. While the City and workforce boards play a critical role in advancing this objective, their efforts must also be aided by the private sector. In order to develop clear talent pipelines for local residents, both private companies and workforce development professionals must join together to form a targeted, data-driven workforce development and placement program.

Action 3.1.1: Engage a quarterly working group of private-sector HR professionals, workforce development practitioners and university representatives to discuss needed skills and training programs.

Action 3.1.2: Build and deliver a talent pipeline and access to jobs for local residents through on-the-job training programs, especially for family-wage jobs. This may include expanding of the City's TechHire program or partnering with EWI Initiatives in Advanced Manufacturing and Cybersecurity.

Action 3.1.3: Develop and administer an annual survey of needed skills and workforce training gaps in Lynchburg. Report and utilize findings to direct regional programs.

GOAL 3

OBJECTIVE

3.2

DEVELOP A SYSTEM OF WORK-BASED LEARNING AND TRAINING INITIATIVES FOR LYNCHBURG'S K-12 STUDENTS.

The City of Lynchburg's workforce development efforts must begin at an early stage, before its young talent reaches college. By creating talent pipelines for students in K-12, and particularly in high school, the City can encourage younger residents to imagine themselves working in one of Lynchburg's target sectors. Because students often have difficulty envisioning their future in a specific trade, the City (and private sector) must demonstrate that highly coveted skillsets lead to growth opportunities.

Action 3.2.1: Review Lynchburg K-12 programs with the Lynchburg City Schools administration to identify opportunities for school programs and facility needs around target sectors and in-demand skills.

Action 3.2.2: Develop a training workshop to educate Lynchburg teachers about the diverse career pathways available for students in the City of Lynchburg.

Action 3.2.3: Engage private sector companies and public sector organizations to adopt dual-credit internship programs for K-12 students.

Action 3.2.4: Improve awareness of programming for underserved populations via a career fair, speaker series, or on-site company field trip.

Action 3.2.5: Support the creation of a Citizens Academy for Students.

OBJECTIVE

3.3

LAUNCH A LYNCHBURG TALENT INITIATIVE.

Given the rising cost of living in cities like New York and San Francisco, people are increasingly drawn to cities with more affordable housing and family-driven amenities such as parks and community events. But these characteristics alone do not always attract new residents. In order for the City of Lynchburg to grow its population, it must cultivate an inclusive environment that appeals to people from all walks of life. One of the most important methods of attracting talent is to develop local initiatives that connect younger residents to the City's business community.

Action 3.3.1: Launch a "Community Ambassadors" program—comprised of students, millennials/young professionals, families with children, members of local anchor institutions and government leaders—to showcase the City of Lynchburg's diverse professional community. In Tulsa, for instance, the TYPros program encourages young professionals to build relationships with local community and business leaders, thereby making the city more attractive to outside talent.

Action 3.3.2: Promote the City of Lynchburg as a desirable place for young, educated professionals—especially "boomerangs" returning home with families.

Action 3.3.3: Partner with area universities and educational institutions to develop mechanisms for encouraging talent retention after graduation. Activities could include a student involvement fair, university day downtown or career day for Lynchburg employers.

GOAL 4

CREATE, EMBRACE, & PROMOTE COMMUNITY.

Quality of place has a major influence on where talent decides to locate. Communities that attract the most talented, highly skilled residents tend to have a strong local identity characterized by a diversity of cultural assets. Increasingly, cities with a firm “placemaking” strategy—one that leverages their strengths to maximize local health, happiness and well-being—are seeing higher levels of investment and development. With its fair share of historical and heritage sites, Lynchburg has an opportunity to position itself as a must-see destination for tourists. By developing a placemaking strategy that centers on these local assets, the City can drive additional economic development.

OBJECTIVE

4.1

ADOPT A PLACEMAKING STRATEGY FOR LYNCHBURG’S DOWNTOWN CORE AND NEIGHBORHOODS.

Though the City of Lynchburg’s placemaking strategy should be cohesive, it cannot ignore the unique nature of its individual communities. At their core, cities are a collection of neighborhoods, each with its own identity and share of local offerings. In order for Lynchburg to establish an authentic quality of place, it must adopt a placemaking strategy for both its downtown area and individual districts, including the implementation of the 2040 Downtown Lynchburg Master Plan. In particular, the City should highlight its walkable urban core, which, unlike the surrounding rural region, is likely to attract more talent, businesses and investment.

Action 4.1.1: Develop, prioritize, and invest in neighborhood placemaking strategies (community events, visual banners, pop-up shops, parklets and others) to define Lynchburg’s distinct communities.

Action 4.1.2: Tell the story of all of Lynchburg’s neighborhoods, utilizing various community engagement mechanisms.

Action 4.1.3: Support the implementation of the Downtown 2040 Master Plan and its various placemaking projects.

Action 4.1.4: Develop a plan to reimagine community centers as “centers of learning and bridges to opportunity.”

GOAL 4

OBJECTIVE

4.2

CREATE STRATEGIES FOR “TOURISM EXPERIENCES” TO DRIVE VISITOR AND TOURISM GROWTH.

The days of old-school tourism trade shows, glossy marketing brochures and magazine advertisements are gone. Instead of cookie-cutter offerings, today’s tourists want authentic, curated experiences. By developing a strategy for building these “experiences,” the City of Lynchburg can drive tourism and economic development, as well as local investments in new restaurants, brew-pubs, recreational activities, concerts and more. This strategy helps connect stakeholders with DMO officials, recreational operators (kayaking, boating, hiking) and cultural curators to create new networks and relationships.

Action 4.2.1: Continue to evaluate current tourism marketing tactics to understand what is driving or deterring destination visitors.

Action 4.2.2: Develop and update a detailed inventory of Lynchburg’s destination assets, including cultural and recreational amenities, music, art, food, breweries, architecture and more.

Action 4.2.3: Convene a quarterly cluster working group to generate and share ideas for how to package and promote the City of Lynchburg as a destination.

Action 4.2.4: Develop curated destination experiences for both local residents and Lynchburg visitors and test innovative integrated marketing and social media techniques.

Action 4.2.5: Advocate for the development and funding of new commercial districts, public spaces, and amenities such as parks, trails, entertainment infrastructure, public art and citywide wayfinding, in support of the Lynchburg Comprehensive Plan.

Action 4.2.6: Transform the Lynchburg Visitors Center into a multi-purpose space to showcase the full “Lynchburg Experience.”

OBJECTIVE

4.3

IMPROVE LYNCHBURG’S CONNECTIVITY.

As sources of ideas and talent, people are chief contributors to local innovation, creativity and economic growth. But, in order to boost an area’s economic development, they must first be able to access it. In today’s increasingly global economy, airports are critical to a city’s connectivity and outreach. The more accessible an area is to outsiders, the more likely it is to land on their radar of potential places to live, work, and do business. In fact, research has shown that airports can help create “favored positions” in the global economy by offering much-needed access to people, goods, money, and information. Research has also shown that a fair share of direct international flights holds major sway over attracting corporate headquarters.

Action 4.3.1: Continue to engage a working group of private, civic and government leaders to explore the expansion of air service to Lynchburg Regional Airport.

Action 4.3.2: Understand the costs associated with expanding air services, develop a proposal for air expansion, and present it to appropriate stakeholders.

Action 4.3.3: Advocate for increased rail, passenger rail and public transportation options to improve connectivity.

GOAL 5

TELL THE CITY OF LYNCHBURG'S STORY.

Economic development is only as powerful as the story it tells. For cities to be successful in their efforts to attract new talent and companies, they must craft a compelling narrative that signifies who they are and communicates a strong sense of culture and community. By telling a story that highlights their local assets, cities can distinguish themselves from their neighbors and re-shape their public brand. These narratives also help to build a sense of civic pride, making residents feel more confident in their community and its leaders.

OBJECTIVE

5.1

DEVELOP A COMPETITIVE IDENTITY FOR LYNCHBURG AND TELL THAT STORY.

For a smaller city like Lynchburg, it becomes imperative to package a compelling story about why the City matters, highlighting key industries and assets that may otherwise have escaped people's radars. The next step is to market this story to a strategic audience, paying specific attention to the ways in which the City of Lynchburg can distinguish itself from nearby competitors.

Action 5.1.1: Engage a placemaking firm to develop a competitive identity and place marketing program for Lynchburg. Build appropriate tools for supporting that identity, including video production, marketing support, and participation in conferences such as the Tom Tom Founders Festival, SXSW and others.

Action 5.1.2: Coordinate with the Lynchburg Regional Business Alliance to ensure that City and regional economic development officials are telling the same story and sharing the same key messages.

Action 5.1.3: Utilize business success stories, local CEOs, engaging entrepreneurs and community leaders to tell the story of the City of Lynchburg's economy and build ongoing relationships with site-selection consultants and prospective businesses.

Action 5.1.4: Develop a communication strategy for engaging the City Council, Economic Development Authority and other City Departments in community outreach.

Steering Committee

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Ben Copeland, Lynchburg City Schools
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