

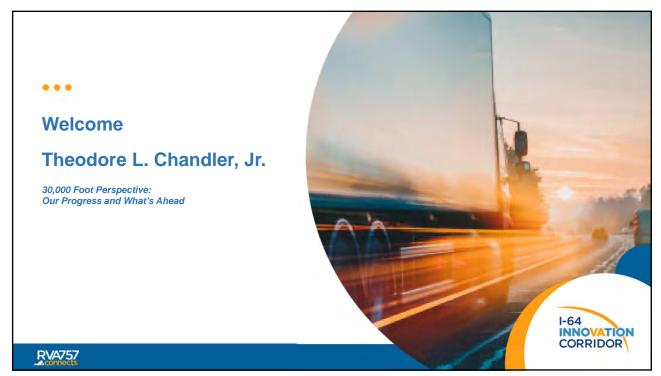
Board of Directors & MIC Meeting

• • •

June 9, 2021



1



Your Executive Committee

All of our weekly meeting minutes are posted on our website.

...

Executive Committee Members

Ted Chandler, Jr. – Co-chair (RVA)
Tom Frantz – Co-chair (757)
Cliff Fleet
Moses Foster
Wilson Flohr, Jr.
Bob Holsworth
Sarah Jane Kirkland
Peggy Layne
John Martin
John Reinhart



Please acknowledge your ratification of:

1. New Board Directors

RVA757

Jim Spore

3

New RVA757 Connects' New Directors

• • •

Monique Adams, Executive Director, 757 Angels

Javaune Adams-Gaston, President, Norfolk State University

Robby Demeria, Chief of Staff, Phlow Corporation

Glenn DuBois, Chancellor, Virginia's Community Colleges (VCCS)

Stephen A. Edwards, CEO & Executive Director, The Port of Virginia

Taylor Franklin, Chief Operating Officer, The Franklin Johnston Group

Stuart Henderson, Director, Jefferson Lab

Lisa Howard, President/CEO, E3: Elevate Early Education

Harvey L. Johnson, Partner & CEO, PBMares

Jim Kibler, Founder, CEO and Managing Member, Next Paradigm Advisors LLC

Bruce Thompson, CEO, Gold Key / PHR

RVA757

Your Executive Committee

All of our weekly meeting minutes are posted on our website.

...

Executive Committee Members

Ted Chandler, Jr. – Co-chair (RVA)
Tom Frantz – Co-chair (757)
Cliff Fleet
Moses Foster
Wilson Flohr, Jr.
Bob Holsworth
Sarah Jane Kirkland
Peggy Layne
John Martin
John Reinhart



Please acknowledge your ratification of:

- 1. New Board Directors
- 2. Board Minutes
- 3. Work of RVA757 Connects' Executive Committee to continue to act on behalf of the full RVA757 Connects' Board on ongoing management matters.

RVA757

Jim Spore

5

RVA757 Connects Governance Structure (<u>Today</u>)

Board of Directors

Co-Chair RVA Co-Chair 757

50+ Directors

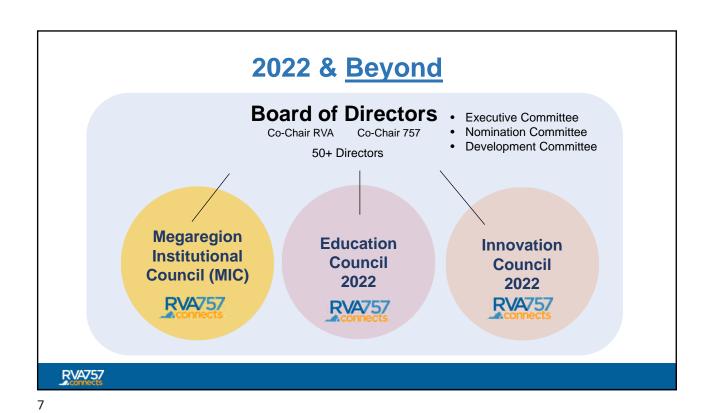
- Executive Committee
 - Nomination Committee
 - Development Committee

Megaregion Institutional Council (MIC)

Community Foundation for a greater Richmond Hampton Roads Community Foundation ChamberRVA Chamber Hampton Roads Virginia Peninsula Chamber Greater Williamsburg Chamber Business Council Greater Richmond Partnership GOVirginia (Region 4) Hampton Roads Alliance GOVirginia (Region 5) Capital Region Workforce Partnership Hampton Roads Workforce Council CIVIC Leadership Institute Grow Capital Jobs Foundation Reinvent Hampton Roads Management Round Table (MRT) Hampton Roads Business Roundtable

In addition, the Virginia Hispanic Chamber and Asian Chamber are on the MIC.

RVA757





Agenda



Welcome - Theodore L. Chandler 5 Min. **RVA757 Connects Priorities Update – John W. Martin** 30 Min. Nominations Committee Report – Sarah Jane Kirkland & Moses Foster 5 Min. **Communications Update – Moses Foster** 5 Min. **Development Committee Report – Mitch Haddon & Jim Kibler** 5 Min. GO Virginia I-64 Innovation Corridor Talent Study – Today & Tomorrow 20 Min. Wilson H. Flohr, Jr. and John W. Martin **Breakout Session** 45 Min. Regroup and Thank You – Thomas R. Frantz 5 Min.

RVA757

C

Our Priority Focus Areas



- 1. Run our 501(c)(3)
- 2. Create and advance our megaregion's brand
- 3. Support our Directors and Members' innovation initiatives
- 4. Implement the GO Virginia Talent Pipeline Study
- 5. Accelerate the understanding of digital connections between RVA and 757
- 6. Increase R&D collaboration
- 7. Support the completion of the Virginia Capital Trail
- 8. Remove barriers to increase passenger rail service
- 9. Advocate for I-64 widening (29-mile gap from RIC to Williamsburg)
- 10. Remain open to opportunities as they emerge

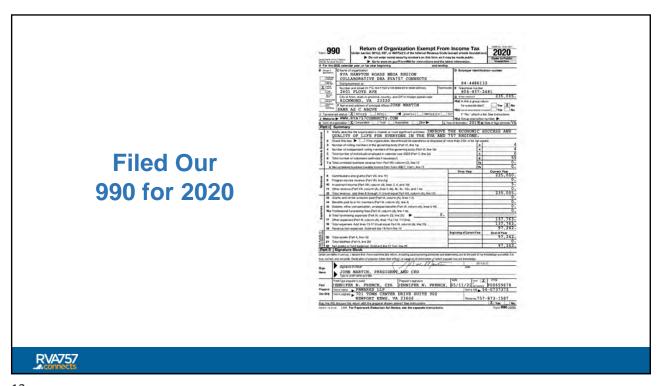
RVA757



RVA757

11

CORDINATION SELECTIVE SELECTIVE SUPPLIES SERVICE SER







Create and advance our megaregion's brand

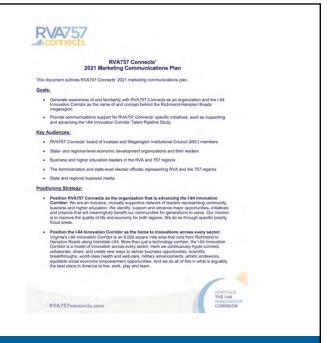
RVA757

15



RVA757

2021 Marketing Communications Plan



RVA757

17

Positioning Strategy:



Position RVA757 Connects as the organization that is advancing the I-64 Innovation
 Corridor: We are an inclusive, mutually supportive network of leaders representing community,
 business and higher education. We identify, support, and advance major opportunities,
 initiatives, and projects that will meaningfully benefit our communities for generations to come.
 Our mission is to improve the quality of life and economy for both regions. We do so through
 specific priority focus areas.



Position the I-64 Innovation Corridor as the home to innovations across every sector: Virginia's I-64 Innovation Corridor is an 8,000 square mile area that runs from Richmond to Hampton Roads along interstate I-64. More than just a technology corridor, the I-64 Innovation Corridor is a model of innovation across every sector. Here, we continuously hyper-connect, collaborate, share, and create new ways to deliver business opportunities, scientific breakthroughs, world-class health and well-care, military advancements, artistic endeavors, and equitable socioeconomic empowerment opportunities. And we do all this in what is arguably the best place in America to live, work, play and learn.

IGNITING
THE I-64
INNOVATION
CORRIDOR

· · · RVA757connects.com

RVA757



Support our directors' and members' initiatives

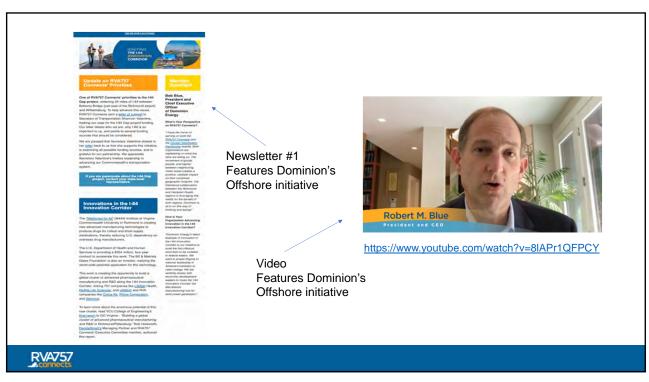
RVA757

10

Coastal Virginia Offshore Wind Industry



RVA757





Implement the GO Virginia Talent Pipeline Study

RVA757

I-64 Innovation Corridor Industry & Talent Study: Today & Tomorrow

- Profile the I-64 Innovation Corridor's industries and talent pool today. (Report #1)
 - Total megaregion talent profile
 - Understand where talent comes from and goes to
 - Current gaps
 - Support areas that need greater attention
- Identify the I-64 Innovation Corridor's industries and talent opportunities of tomorrow. (Report #2)
 - COVID-19 lasting trends and related impacts
 - Impact of distributed workforce
 - Talent needs of the future
 - Support areas that need greater attention
- Identify the pathway forward to ensure the I-64 Innovation Corridor becomes even more competitive in the future. (Future GO Virginia grant)



RVA757

23

Research Council

• • •

John Martin Jeff Tanner

Bob Holsworth Glenn Carrington

Renee Haltom Doug Smith

Chris Chmura Brian Davis

Jennifer Wakefield Michael Rao

Rachel Burgess Brian Anderson & Bryan Stephens

RVA757

Process - Timeline

• • •

1ST Quarter 2021 (JAN - MARCH 2021)

Establish Project's Research Council

Finalize the Work Plan and Detailed Calendar

Identify Project's Key Stakeholders & Audiences for the Final Reports (e.g., Workforce Industry, Economic Development Partners,

Educational Institutions, and RVA-757 Connects' Audiences)

Identify and Inventory Relevant Pre-existing Studies and Reports

Identify and Inventory Relevant Third-party Active Research Projects (For example: the Virginia Bio-tech Initiative)

2nd Quarter 2021 (April - June 2021)

Mine Pre-existing Studies, Reports and Active Third-party Research Conduct Primary Research (If Research Council Feels This Is Needed) Identify Major Insights and Implications

We are here in this overall process

3rd Quarter (July - Sept 2021)

Prepare Initial Drafts of Report 1: Current Talent Pipeline

Prepare Initial Drafts of Report 2: Future Talent Pipeline Trends and Needs

Share Draft Reports and Get Feedback From a Sample of Representatives from Project's Key Stakeholders & Audiences

4th Quarter (Oct - Dec 2021)

Finalize and Package Reports 1 and 2 with RVA-757 Connects' branding

Share Final Reports with all of the Project's Key Stakeholders & Audiences

Submit to GO Virginia RVA-757 Connects' Recommendations on the Future Strategy for the I-64 Innovation Corridor Talent Pipeline (not part of this grant request)

Finish all GO Virginia's Grant Obligations

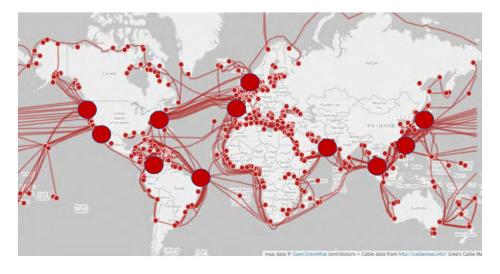
RVA757

25



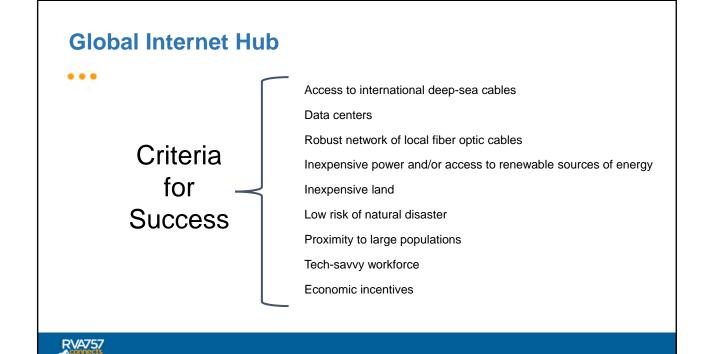
Accelerate the understanding of digital connections between RVA and 757

I-64 Innovation Corridor is becoming a Global Internet Hub



RVA757

27



I-64 Innovation Corridor is becoming a Global Internet Hub

Access to international deep-sea cables

Data centers

Robust network of local fiber optic cables Inexpensive power and/or access to renewable sources of energy

Inexpensive land

Low risk of natural disaster Proximity to large populations

Tech-savvy workforce

Economic incentives

Major tech players investing

Virginia Beach has two transoceanic fiber cables connecting North America to Brazil and Europe. Two new cables have been announced. One of the cables is the fastest of nearly 450 subsea cables in the world and is able to transmit every movie ever made from one side of the ocean to the other in just 42 seconds.

RVA: White Oak Technology Park (328-acre complex) will eventually have 2.5 million square feet of datacenter space, one of 11 integration buildings in the world.

Dominion is supporting Henrico data center with 100% solar energy from Virginia-based projects.

Hampton Roads is investing in a regional fiber network ring that will connect to the transoceanic fiber cables.

Fiber optic cable runs from Hampton Roads to RVA.

I-64 Innovation Corridor serves the growing mid-Atlantic region.

Virginia and some counties offer incentives for data centers with size investment.

Facebook - opened the first phase of its \$1.75-billion data center in RVA.

Facebook, Microsoft, and Telxius joined to build one of the cables – that connects Spain and Virginia.

RVA757

29





October 1st 11:30 am – 1:00 pm Virtual Forum

How Collaboration Along I-64 Innovation Corridor is Making Us a Global Internet Hub and How This Will Impact Every Business



Increase R&D collaboration

RVA757

31

Help VCU Engineering School Advance Collaboration Among All Virginia Universities and Colleges on academic computing programs, both scope and scale.

C4

Enterprise Computing & Data Center Building a World-Class Learning and Development Capability Creating the "Tech Sandbox"

- Bring the latest cloud & mainframe computing/AI platforms to RVA -Integrate with Data Centers and Networks.
- Partner with the local business community support existing Enterprise Computing owners/users.
- Create collaboration on many levels open lines of communication, provide forum for sharing technology initiatives, expand workforce pipeline, engage employers in the classroom, host conferences.
- Strengthen academic computing programs, both scope and scale.
- Provide a platform for the extensive Global Open-Source Community; bring global technology providers/developers to VA.
- Community resource for local workforce pipelines and pathways activities: CodeVA, RVATech, K-12 STEM outreach, county-based technical centers, community colleges, industry groups.
- Platform for relevant applications research Personalized medicine, smart cities, data lakes, cyber-range, healthcare.

RVA757



Support the completion of the Virginia Capital Trail

RVA757

33

Capital Trail

Richmond to Williamsburg



This took 20 years to build!

RVA757

Momentum is Building

Williamsburg to Fort Monroe



- HRPDC/HRTPO has made this a priority.
- Regular meetings with Peninsula CAOs to coordinate/advance progress.
- 757 localities are aligned and welcome support.

RVA757

35

Williamsburg to Fort Monroe Updates

- Regional Effort to Request House Appropriate/Earmark.
- Congressman Scott submitted request for \$3.2 Million to build approximately 4 miles of trail within Newport News City Park – local match provided by City.
- Regional request also submitted to senators for this trail section.



RVA757

Williamsburg to Fort Monroe

Additional Updates

- HRPDC/HRTPO to submit application through Federal RAISE Program.
- Application Due July 12th Can Request up to \$25 Million Requires 20% Local Match.
- HRPDC/HRTPO working with Peninsula CAOs to determine Eligible Trail Segments.
- Must demonstrate benefit to Poverty Communities.
- Request Megaregion Letter of Support.

RVA757

37

Williamsburg to Fort Monroe

Additional Updates

- HRPDC/HRTPO has secured On-Call Consultant from VDOT, with \$200,000 of resources to support On-Call Consultant Work.
- VDOT has appointed Project Manager.
- Goal is to advance project segments as candidates for grant applications.
- · Refinement of route locations.
- Prepare for Federal Infrastructure Package and next Smart Scale Application Round.



Remove barriers to increase passenger rail service

RVA757

39

Virginia Rail Authority & Virginia's \$3.7 billion deal with CSX

 DRPT has established the schedules for all six Hampton Roads trains in the recently signed CSX agreement. This is one priority area that is moving...

Still, we need to fully engage.

RVA757

Ultimate Schedules ("Phase 2") Based on CSX Agreement

Norfolk Service

- The two existing trains will remain basically unchanged (morning departures, evening arrivals).
- The 3rd train will arrive 11:33am and depart 1:30pm (i.e. both midday).
 - Implemented in the "Acquisition Phase".

Peninsula Service

- The two existing trains will remain basically unchanged (midday and evening arrivals, early morning and 5pm departures).
- The 3rd train will arrive 11:23pm (i.e. midnight) and depart 8:52am (i.e. midmorning).
 - Implemented after "Phase 1" infrastructure improvements made by DRPT/VPRA.

Source: https://transformingrailva.com/wp-content/uploads/2021/05/11.1.1.27-Exhibit-D-CRA.pdf

RVA757

41

Passenger Rail Train Schedules

Pro & Con

Pro

 The 3rd Norfolk train and 3rd Peninsula train will provide needed variety in timing with both schedules (i.e. the 3rd train schedule is very different from those of the 1st and 2nd trains).

<u>Con</u>

- There will be overlap in arrival times, so instead of HR residents & visitors having the choice of 6 different arrival times and 6 different departure times, they have the choice of 3 different arrival times and 4 different departure times.
- This lack of cross-harbor variety also limits the connections in Richmond and Petersburg to southern trains.

Amtrak's Thru-way Bus Service

Virginia Beach, Norfolk, and Newport News will also have more frequent buses under the CSX agreement.



RVA757

43



Advocate for I-64 widening (29-mile gap from RIC to Williamsburg)

RVA757

Advocating for the Widening of the 29-mile Gap on I-64

- I-81 trucking fees are creating a war chest for I-81 improvements.
- 11% of these funds go to I-64 improvements from the West Va. Line to Virginia Beach.
- \$32M already banked.
 \$140M+ more by 2027.



- 4. I-64 Corridor Improvement Study is underway.
- If this study concludes that the I-64 Gap Project is a priority, it will get funding.
- Starting designbuild process puts us in the best position for Federal dollars.

RVA757

45

RVA757 Connects' Whitepaper Letter to Secretary Valentine Advocating for the I-64 Gap Project



- Explained the I-64 Innovation Corridor what, why, who, and how.
- Made a business case for the I-64 Gap project.
- Showed how the project is an investment in commerce, workforce development, and economic competitiveness of the Richmond-Hampton Roads megaregion and our Commonwealth.
- Identified sources of funding including some existing pockets of money.
- Pointed to RVA757 Connects' directors who are behind this request.
- Copied all CTB members and all state-level elected officials from RVA and 757.

Response From Secretary Valentine



"We understand that expanding the capacity and reliability of the corridor is an investment in commerce, workforce development, and economic competitiveness of the Richmond-Hampton Roads megaregion and our Commonwealth. We are committed to identifying every option and are grateful for your partnership."

Secretary Sharron Valentine

RVA757

47

10

Remain open to opportunities as they emerge

RVA757



Stuart Henderson Director, Jefferson Lab

- Jefferson Lab is working with Department of Energy to establish a world-leading computational facility located at Jefferson Lab.
- FY22 Department of Energy Budget Request to Congress states:

"In FY 2022, ASCR will design a state-of-the-art Scientific High Performance Data Facility focused on the unique challenges and opportunities for data-intensive applications workflows and near real-time computing needed to support the explosion of scientific computation (SC) / scientific data that will serve as the anchor for the Integrated Computational and Data Infrastructure Initiative ...

...to provide geographic diversity and operational resiliency, this facility will be located on the East Coast."

RVA757

49



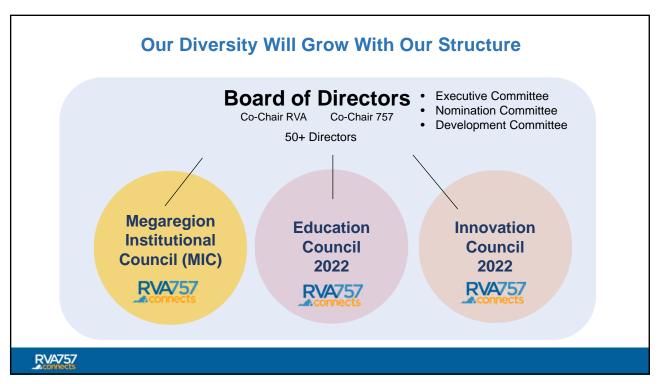
New RVA757 Connects' Directors

...

- Our By-laws call for up to 75 directors.
- In 2020, when we became a 501(c)(3), we started with 10 directors.
- 32 directors added in January 2021.
- Today, the Executive Committee approved 11 new directors.
- Director criteria:
 - · Recognized business or higher education leader
 - Plugged into what's happening
 - · Passionate about driving our regions forward

RVA757

51



New RVA757 Connects' Directors





Monique Adams, Executive Director, 757 Angels



Glenn DuBois, Chancellor, Virginia's Community Colleges (VCCS)



Javaune Adams-Gaston, President, Norfolk State University



Stephen A. Edwards, CEO & Executive Director, The Port of Virginia



Robby Demeria, Chief of Staff, Phlow Corporation

RVA757

53

New RVA757 Connects' New Directors





Taylor Franklin, Chief Operating Officer, The Franklin Johnston Group



Lisa Howard, President/CEO, E3: Elevate Early Education



Stuart Henderson, Director, Jefferson Lab



Harvey L. Johnson, Partner & CEO, PBMares



Bruce Thompson, CEO, Gold Key / PHR



Jim Kibler, Founder, CEO and Managing Member, Next Paradigm Advisors LLC

RVA757

New RVA757 Directors' Orientation

...

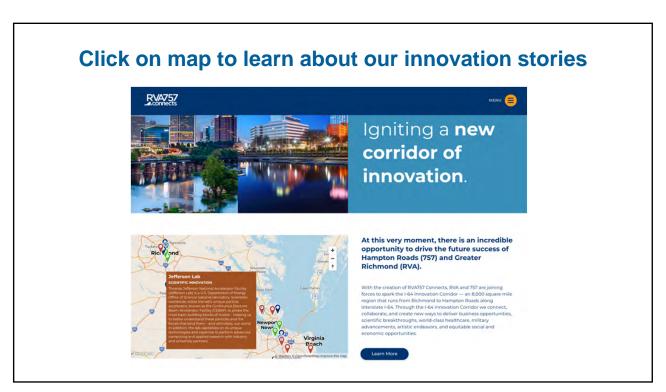
- July 1, 7:45 am 8:45 am
- We also have a recorded briefing video.
- · All directors and MIC members invited.

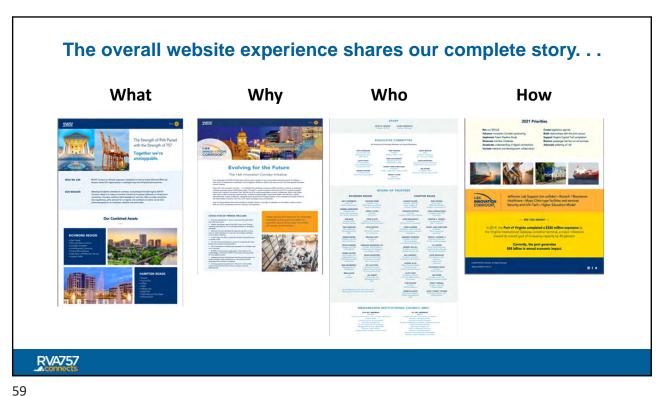
RVA757

5

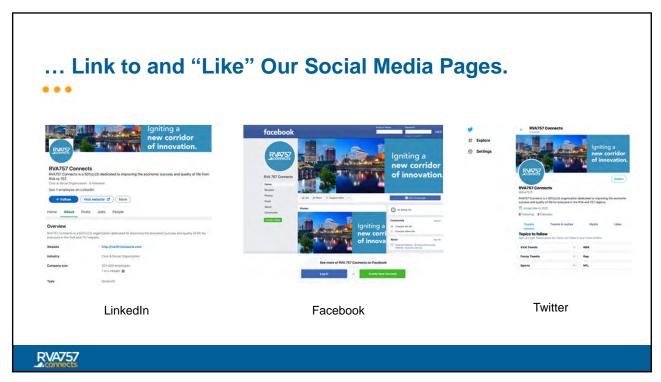


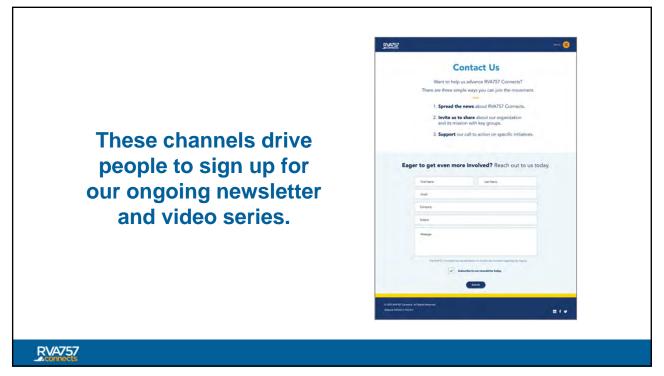












... Videos share stories and build familiarity

Michael Rao: https://www.youtube.com/watch?v=3EgOYXjb970

Howard Kern: https://vimeo.com/551970549

Bob Blue: https://youtu.be/8IAPr1QFPCY

Bryan Stephens: https://vimeo.com/558219465

Brian Anderson: https://vimeo.com/558224521

John Reinhart: https://vimeo.com/545980934

RVA757

63

We Need Your Help –
Your Immediate "To Do" List

1. Provide Innovation Stories

Medical Innovations: The "Medicines for All" (M4AII) Institute at Virginia Commonwealth University in Richmond has created new advanced manufacturing technologies to produce drugs for critical and short-supply medications, thereby reducing U.S. dependency on overseas drug manufacturers. The U.S. Department of Health and Human Services is providing a \$354 million, four-year contract to accelerate and connect others this work. The I-64 Innovation Corridor is the brithplace for this remarkable innovation that will serve the world.

Energy Innovations: At the other end of the I-64 Innovation Corridor, Dominion Energy is investing in off-shore wind and working closely with others to make the mid-Atlantic region the manufacturing hub for wind power generation.

Scientific Innovations: Jefferson Lab is home to the world's Continuous Electron Beam Accelerator Facility (CEBAF). Thousands of scientists worldwide come here to probe the most basic building blocks of matter, making the I-64 Innovation Corridor a world-wide resource.

Aviation and Space Innovations: NASA Langley is part of the I-64 Innovation Corridor. This is where researchers inspired the original Mercury missions that took America into space. Today, Langley's scientists are part of the team that's directing the unmanned rover and drone on Mars. Next up, putting the first women on the moon and mankind on Mars.

Military Innovations: The U.S. military invests millions of dollars annually in research to advance new aircraft concepts and design through aeronautics, atmospheric sciences, and space technology research. Millions more are being directed to advance the latest missile technology research, future ship design, the latest medical treatments for posttraumatic stress disorder.

Digital Data Innovations: Technology experts estimated that 60% of the world's Internet traffic goes through Northern Virginia. Investments by Google, Amazon and others are being made all along the I-64 Innovation Corridor that will now solidifying Virginia's position as the world-wide web's digital backbone. This includes the new transatlantic fiber optic cables that come ashore in Virginia Beach, fiber optic cables that run along I-64 from Hampton Roads to Richmond, and the growing number of data centers along the corridor.

College and University-based Innovations: All along the I-64 Innovation Corridor, Virginia's colleges and universities are inspiring the next generation of Virginia's innovators. This includes da Vinci Center at Virginia Commonwealth University, the Alan B. Miller Entrepreneurship Center of William & Mary, the Old Dominion University Innovation Center (ICN) and new Norfolk State University Innovation Center in Norfolk.

RVA757

65

2. Help Us Build Our Database

...

RVA757 Connects' Database:

 $\,$ GA members from RVA and 757 $\,$

Main leadership (Speaker, Majority and minority leaders, money committee chairs – all of whom are not from the region)

Governor, Chief of staff, and Cabinet

 $\label{eq:Key State Agency Heads-VEDP, DHCD, Small Business, VDOT, DRPT, Superintendent of Education, SCHEV, etc.$

All local elected officials in the corridor, as well as the chief appointed officials (county administrator or city manager)

All citizen appointees on regional bodies like CVTA, HRTAC, etc.

All economic development leaders – regional and local in region

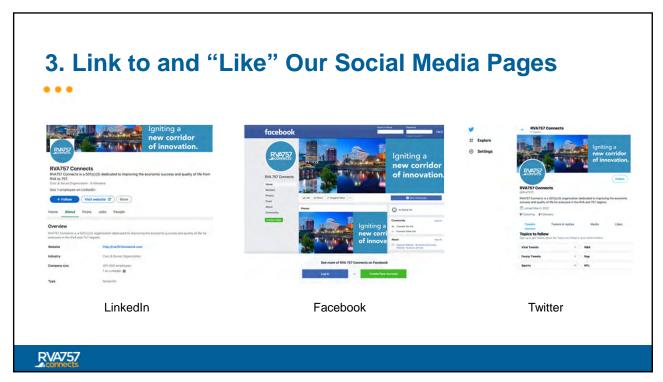
All college presidents and BOV chairs in the region

All Commonwealth Transportation Board members from the region

GO Virginia Board (both state board and the members from Regions 4 and 5)

Add to Our Database

- You are automatically signed up on the RVA757 Connects' database.
- We will send you an opt-in email for you to easily invite others to follow RVA757 Connects. Forward this email to:
 - · Your senior team
 - Your board
 - Your colleagues
 - Your top suppliers





Our Development Committee

•••

Jim Kibler (Next Paradigm Advisors, LLC) – Co-Chair (757)

Mitch Haddon (ColonialWebb Contractors Company) – Co-Chair (RVA)

Shawn Avery - Hampton Roads Workforce Council

Anne Conner - TowneBank

Dawna Ellis - Harvey Lindsay Commercial Real Estate

Ross Grogg – Kemper Consulting

Brad Hulse - Hourigan

Martin Joseph - 360 IT Partners

Brian Rountree - Bank of America

RVA757

69

Our Goal

•••

\$500K

Annual goal* to become self-sustaining**

* \$250K remaining for 2021

**Community Foundations' support is start-up related

Our Charge

...

- 1. Every Director provides some level of support.
- 2. MIC members provide support as possible.
- 3. Corporate and individual gifts accepted.
- 4. Annual gift commitment for a 3-year period.
- 5. Approach all BOD and MIC members this summer. Report success at our next meeting: September 15, 2021.

RVA757

71

Our Sincere Appreciation







COLONIALWEBB A SOMFORTUGA COMPANY



- Wilson H. Flohr, Jr.
- Thomas R. Frantz
- Mitch Haddon
- Sarah Jane Kirkland
- John F. Reinhart









Our Ask

•••

Answer our call!



RVA757

73

GO Virginia
I-64 Innovation Corridor
Talent Study

Wilson H. Flohr, Jr. & John W. Martin

20 Min.



RVA757

What to Know About GO Virginia and Virginia's Regions

- Wilson H. Flohr, Jr.

...

- GO Virginia is a legislative initiative to foster private-sector growth and job creation through state incentives with regional collaboration by business, education, and government.
- 2. We are very interested in regions working together. There is a separate fund to support <u>multi</u>-regional grants.
- 3. GO Virginia's Region 4 (RVA) and Region 5 (757) are delighted to support the I-64 Innovation Corridor Talent Study.
- 4. We are expecting this planning grant will lead to a collaborative grant proposal this fall for 2022.

RVA757

75

Study Timeline – We're half way





1ST Quarter 2021 (JAN - MARCH 2021)

Establish Project's Research Council

Finalize the Work Plan and Detailed Calendar

Identify Project's Key Stakeholders & Audiences for the Final Reports (e.g., Workforce Industry, Economic Development Partners,

Educational Institutions, and RVA-757 Connects' Audiences)

Identify and Inventory Relevant Pre-existing Studies and Reports Identify and Inventory Relevant Third-party Active Research Projects (For example: the Virginia Bio-tech Initiative)

2nd Quarter 2021 (April - June 2021)

Mine Pre-existing Studies, Reports and Active Third-party Research Conduct Primary Research (If Research Council Feels This Is Needed) Identify Major Insights and Implications

We are here in this overall process

3rd Quarter (July - Sept 2021)

Prepare Initial Drafts of Report 1: Current Talent Pipeline

Prepare Initial Drafts of Report 2: Future Talent Pipeline Trends and Needs

Share Draft Reports and Get Feedback From a Sample of Representatives from Project's Key Stakeholders & Audiences

4th Quarter (Oct - Dec 2021)

Finalize and Package Reports 1 and 2 with RVA-757 Connects' branding

Share Final Reports with all of the Project's Key Stakeholders & Audiences

Submit to GO Virginia RVA-757 Connects' Recommendations on the Future Strategy for the I-64 Innovation Corridor Talent Pipeline (not part of this grant request)

Finish all GO Virginia's Grant Obligations

RVA757

I-64 Innovation Corridor
Industry & Talent Study:
Today & Tomorrow



- · Profile the megaregion's talent and industry today
- Understand where our talent comes from and goes
- Profile COVID-19 workforce trends and related impact on the future of work
- Profile the impact of an increasingly distributed workforce
- Identify talent and industry opportunities for the future
- Identify areas that will benefit from greater intentionality - our pathway forward to ensure the I-64 Innovation Corridor becomes even more competitive in the future. (Future GO Virginia grant)

Today: Very high level – 5 key findings

Over the next 60 days - more findings

Reports this fall.

RVA757

77

1. We are not growing as fast as other regions.

Megaregion Comparisons – Employment Growth

Region		Population Annual Average Growth (2009-2019)	Employment (2020Q3)	Forecast Employment Growth (Average Annual Rate 2020Q3-2030Q3)
Raleigh-Cary, NC MSA	1,390,785	2.3%	662,325	1.69
Nashville-DavidsonMurfreesboroFranklin, TN MSA	1,934,317	1.7%	1,034,884	1.59
Charlotte-Concord-Gastonia, NC-SC MSA	2,636,883	1.7%	1,276,784	1.49
Denver-Aurora-Lakewood, CO MSA	2,967,239	1.7%	1,572,471	1.49
Orlando-Tampa FL Megaregion	5,802,978	1.8%	2,689,782	1.39
Jacksonville, FL MSA	1,559,514	1.6%	721,122	1.29
Atlanta-Sandy Springs-Alpharetta, GA MSA	6,020,364	1.4%	2,834,590	1.19
Columbus, OH MSA	2,122,271	1.2%	1,076,754	0.79
Charlottesville, VA MSA	218,615	0.9%	113,625	0.59
Richmond, VA MSA	1,291,900	0.9%	656,014	0.59
Washington-Arlington-Alexandria, DC-VA-MD-WV MSA	6,280,487	1.2%	3,267,882	0.49
I-64 Innovation Corridor (without Eastern Shore)	3,067,223	0.6%	1,437,029	0.29
I-64 Innovation Corridor (including Eastern Shore)	3,111,249	0.6%	1,455,055	0.29
Virginia Beach-Norfolk-Newport News, VA-NC MSA	1,768,901	0.4%	778,697	-0.19
Source: JobsEQ® by Chmura				

79

2. Combining RVA-757 labor markets puts us in another league.

Megaregion Comparisons – Labor Market

Region	Population (2019)	Employment (2020Q3)
Raleigh-Cary, NC MSA	1,390,785	662,325
Nashville-DavidsonMurfreesboroFranklin, TN MSA	1,934,317	1,034,884
Charlotte-Concord-Gastonia, NC-SC MSA	2,636,883	1,276,784
Denver-Aurora-Lakewood, CO MSA	2,967,239	1,572,471
Orlando-Tampa FL Megaregion	5,802,978	2,689,782
Jacksonville, FL MSA	1,559,514	721,122
Atlanta-Sandy Springs-Alpharetta, GA MSA	6,020,364	2,834,590
Columbus, OH MSA	2,122,271	1,076,754
Charlottesville, VA MSA	218,615	113,625
Richmond, VA MSA	1,291,900	656,014
Washington-Arlington-Alexandria, DC-VA-MD-WV MSA	6,280,487	3,267,882
I-64 Innovation Corridor (without Eastern Shore)	3,067,223	1,437,029
I-64 Innovation Corridor (including Eastern Shore)	3,111,249	1,455,055
Virginia Beach-Norfolk-Newport News, VA-NC MSA	1,768,901	778,697
Source: JobsEQ® by Chmura		

V57

81

3. While our industry and occupation mix are diverse, we have limited advantages over other regions.

Shipbuilding, business management, government, national security, architectural/engineering, financial, and tourism.

Location Quotient (LQ)

LQ is basically a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region "unique" in comparison to the national average.

RVA757

83

NAICS	Industry	Empl 2020Q3	Avg Ann Wages	LQ
7225	Restaurants and Other Eating Places	97,645	\$17,861	1.07
6111	Elementary and Secondary Schools	84,727	\$43,145	1.12
6221	General Medical and Surgical Hospitals	52,794	\$67,125	0.92
3366	Ship and Boat Building	41,480	\$75,665	24.20
5511	Management of Companies and Enterprises	34,044	\$116,114	1.52
5613	Employment Services	32,724	\$39,973	1.05
9221	Justice, Public Order, and Safety Activities	31,183	\$59,833	1.69
9281	National Security and International Affairs	30,434	\$90,470	5.19
6211	Offices of Physicians	30,407	\$93,801	1.1
4451	Grocery Stores	29,227	\$25,935	1.1
6113	Colleges, Universities, and Professional Schools	28,242	\$58,421	0.99
5617	Services to Buildings and Dwellings	27,482	\$29,474	1.10
2382	Building Equipment Contractors	26,616	\$55,191	1.1
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	24,389	\$26,843	1.2
5413	Architectural, Engineering, and Related Services	23,412	\$83,383	1.49
5241	Individual and Family Services	22,636	\$30,019	0.83
3131	Religious Organizations	20,637	\$22,717	1.2
5222	Non-depository Credit Intermediation	19,636	\$125,014	3.48
5415	Computer Systems Design and Related Services	18,236	\$89,208	0.83
7139	Other Amusement and Recreation Industries	17,355	\$20,448	1.40

4. Our growth opportunities may center on target clusters.

RVA757

85

Four example target clusters

•••

TRANSCENDENT TRENDS

Population increase in mid-Atlantic – need for movement of goods (transportation and logistics/Port)

Explosive growth in healthcare category /life sciences

Exponential growth in volume of data

Exponential growth in data threats - cyber security – and national security

- 1. National Security / Cyber Security
- 2. Pharmaceutical Manufacturing & Life Sciences
- 3. Logistics / Distribution / Supply Chain
- 4. Data Centers / Digital Network

RVA757

Both Regions' Economic Development Efforts Are Focused On These Opportunities:

...

RVA Target Industries

- · Corporate Services
- Information Technology
- Finance & Insurance
- BioScience
- Advanced Manufacturing
- Supply Chain
- · Food & Beverage

List 757 Target Industries

- Advanced Manufacturing
- Business & Shared Services
- Distribution & Logistics
- Food & Beverage Processing
- Information Technology
- Offshore Wind

RVA757

87

Our Economic Development Agencies Are Growing This Cluster Information Technology Plug Into Info Tech In Hampton Roads The Bollows Brown as eastern case as a few and a few a



29

National Security / Cyber Security

RVA757

	-64 Innovation Corridor	Richmond	Hampton Roads	Philadelphia	Charlotte	Atlanta	Jacksonville	Washington, DC	Denver	Pittsburgh	Nashville	Columbus	Orlando- Tampa	
Current Cluster Empl	37,895	9,516	28,202	20,620	5,908	12,691	9,673	100,126	11,815	4,953	3,893	10,839	13,683	
Current LQ	3.63	2.02	5.04	1.02	0.64	0.63	1.85	4.28	1.05	0.62	0.52	1.39	0.72	
LQ 2030	3.43	2.02	4.73	0.98	0.69	0.66	1.77	<mark>4.20</mark>	1.09	0.63	0.55	1.35	0.73	

91

Transportation & Logistics / Supply Chain

RVA757

Recent Announcements



+37 Jobs (March 2020)



+ 1,000 Jobs (April 2021)



+415 Jobs (February 2021)





\$197,229 Investment (October 2020)

RVA757

93

Transportation & Logistics/Supply Chain

	I-64 Innovation Corridor	Richmond	Hampton Roads	Philadelphia	Charlotte	Atlanta	Jacksonville	Washington, DC	Denver	Pittsburgh	Nashville	Columbus	Orlando- Tampa	Raleigh
Current Cluster Empl	52,804	26,799	25,722	100,634	54,609	126,182	43,684	57,905	51,800	33,594	57,518	71,602	66,257	15,778
Current LQ	1.05	1.18	0.96	1.03	1.23	1.29	1.74	0.51	0.96	0.87	1.60	1.91	0.72	0.69
LQ 2030	1.10	1.25	0.98	1.03	1.23	1.29	1.71	0.52	1.00	0.87	1.64	1.95	0.72	0.69

To reach a competitive advantage LQ of 1.25, we need to focus on retaining our talent and retaining or attracting businesses to the megaregion that need 6,250 new workers to support their operations.

V57

Data Centers / Digital Network

RVA757

95

Recent Announcements



Investment: \$425 Million (October 2020)



+60 Jobs (October 2018, starting 2021)



+250 Jobs (September 2018, starting 2021)



+120 Jobs (October 2018, starting 2021)

RVA757

Data Centers / Digital Network

	I-64 Innovation Corridor	Richmond	Hampton Roads	Philadelphia	Charlotte	Atlanta	Jacksonville	Washington, DC	Denver	Pittsburgh	Nashville	Columbus	Orlando- Tampa	Raleigh
Current Cluster Empl	6,817	3,419	3,336	22,716	11,332	39,644	5,043	29,065	29,646	6,225	7,594	7,044	25,111	7,272
Current LQ	0.72	0.80	0.66	1.23	1.35	2.16	1.07	1.37	2.91	0.86	1.13	1.00	1.45	1.68
LQ 2030	0.76	0.84	0.71	1.16	1.35	<mark>2.15</mark>	1.07	1.41	2.93	0.82	1.18	0.99	1.42	1.68

To reach an LQ of 1.00, matching the national share of employment in this industry, we need to focus on retaining our talent and retaining or attracting businesses to the megaregion that need 2,090 new workers to support their operations. . . . Dare to dream 10K people 2.0 LQ

⊽57

97

Pharmaceutical Manufacturing & Life Sciences

RVA757

Major Companies and Recent Announcements







+156 jobs



+300 jobs



+200 jobs

RVA757

99

Pharmaceutical Manufacturing & Life Sciences 엄 Current 16,485 55,752 14,592 7,626 8,833 13,451 32,563 8,161 45,188 23,895 20,994 12,209 18,291 35,144 **Cluster Empl** 0.79 Current LQ 0.81 0.79 1.37 0.73 0.80 0.78 0.97 1.06 0.82 0.92 1.53 1.31 1.18 LQ 2030 0.87 0.94 0.82 1.36 0.73 0.80 0.75 0.95 1.04 1.33 0.83 1.15 0.92 1.53 If we do nothing our LQ will increase, yet we will trail growth in cities like Raleigh, Philly, and Pittsburg. To reach an LQ of 1.00, we need to focus on retaining our talent and retaining or attracting businesses to the megaregion that need 2,800 new workers to support their operations. **V**57

101

5. We have a talent retention challenge.

RVA757

Brain Drain in the Corridor - 2019

...

- Transportation, Distribution, & Logistics-Related Programs
 - 800 awards in 2019
 - 80% left
- IT-Related Programs:
 - 3,200 awards in 2019
 - 43% left

- National Security / Cyber Security
 - 1,600 awards in 2019
 - 40% left
 - More than half of exiting military stay in Hampton Roads
- Life Sciences-Related Programs:
 - 9,700 awards in 2019
 - 39% left

RVA757

103

Alumni Retention: Half from I-64 Innovation Corridor Leave Region, 30% Return

Region	Stayed or Returned	Left
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD MSA	61%	39%
Charlotte-Concord-Gastonia, NC-SC MSA	60%	40%
Atlanta-Sandy Springs-Alpharetta, GA MSA	56%	44%
Jacksonville, FL MSA	54%	46%
Washington-Arlington-Alexandria, DC-VA-MD-WV MSA	53%	47%
Denver-Aurora-Lakewood, CO MSA	53%	47%
Pittsburgh, PA MSA	53%	47%
Nashville-DavidsonMurfreesboroFranklin, TN MSA	51%	49%
I-64 Innovation Corridor	50%	50%
Columbus, OH MSA	50%	50%
Orlando-Tampa FL Megaregion	48%	52%
Raleigh-Cary, NC MSA	44%	56%

757

Where do Alumni of Postsecondary Institutions in the I-64 Innovation Corridor Reside?

	Bachelor's or Higher	Total
41.7%	23.6%	29.0%
26.2%	21.9%	23.1%
3.6%	17.2%	12.8%
0.9%	4.1%	3.1%
1.7%	2.6%	2.3%
0.6%	1.7%	1.3%
0.9%	1.4%	1.3%
0.6%	1.6%	1.3%
0.8%	1.3%	1.1%
0.7%	1.1%	1.0%
0.4%	1.1%	0.9%
0.7%	0.8%	0.8%
0.6%	0.7%	0.7%
0.4%	0.7%	0.6%
0.3%	0.8%	0.6%
0.4%	0.6%	0.5%
0.6%	0.5%	0.5%
0.5%	0.5%	0.5%
0.7%	0.4%	0.5%
0.3%	0.5%	0.4%
	26.2% 3.6% 0.9% 1.7% 0.6% 0.9% 0.6% 0.8% 0.7% 0.4% 0.7% 0.4% 0.7% 0.4% 0.6% 0.4% 0.3% 0.4% 0.5% 0.5%	26.2% 21.9% 3.6% 17.2% 0.9% 4.1% 1.7% 2.6% 0.6% 1.7% 0.9% 1.4% 0.6% 1.6% 0.8% 1.3% 0.7% 1.1% 0.4% 1.1% 0.6% 0.7% 0.4% 0.7% 0.3% 0.8% 0.4% 0.6% 0.5% 0.5% 0.5% 0.5% 0.7% 0.4%

105

Perhaps Philly has addressed this challenge

Region	Stayed or Returned	Left
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD MSA	61%	39%
Charlotte-Concord-Gastonia, NC-SC MSA	60%	40%
Atlanta-Sandy Springs-Alpharetta, GA MSA	56%	44%
Jacksonville, FL MSA	54%	46%
Washington-Arlington-Alexandria, DC-VA-MD-WV MSA	53%	47%
Denver-Aurora-Lakewood, CO MSA	53%	47%
Pittsburgh, PA MSA	53%	47%
Nashville-DavidsonMurfreesboroFranklin, TN MSA	51%	49%
I-64 Innovation Corridor	50%	50%
Columbus, OH MSA	50%	50%
Orlando-Tampa FL Megaregion	48%	52%
Raleigh-Cary, NC MSA	44%	56%

106





Our Impact

Four generations of college students have now attended college in our region since Campus Philly's creation and the impact is everywhere you look:

115%

increase in Philadelphians 25-34 with college degrees between 2000 and 2017. (Last decade Philly actually lost 25-34 year olds.) 118,500

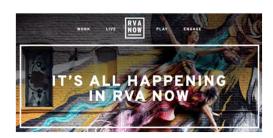
additional young degree holders (between 25-34) in the Greater Philadelphia region between 2000 and 2017. 54%

Greater Philadelphia retains 54% of its regional college students (compared to 42% in Boston).

RVA757

107

We have just launched two similar programs



RVA NOW



Campus 757

RVA757

Our Competition Is Fierce

RVA757

109

Some Localities are Aggressively Recruiting Workers

West Va. Remote Work Program Offers \$12,000 Cash, Free Outdoor Recreation, and More



Cash: \$12,000 in cash with no strings attached. The funds can be used to assist with moving and living expenses or explore new passions and hobbies in West Virginia.

Free Outdoor Recreation: One year of free outdoor recreation to fully explore 2,032 miles of whitewater, 4,000 rock climbing routes, 1.5 million acres of public lands, 1,500 miles of public trails and America's newest national park: New River Gorge Park and Preserve. The package is valued at more than \$2,500 and encourages a healthy work-life balance filled with hiking, ATV-ing, ziplining, ratting, rock climbing, golfing, sking, and more.

Free coworking space: A break free from the ordinary with access to inspiring spaces in the heart of thriving mountain towns. Here, remote workers will have modern amenities to stay connected and access to more than \$1,200 in free outdoor gear rentals for use with family and friends.

Professional advancement: The ability to earn remote work certifications through West Virginia University and access to John Chambers College of Business and Economics' entrepreneurship ecosystem.

Networking: The chance to be a guest at a variety of exclusive events to connect entrepreneurs with state business leaders and guided excursions to experience West Virginia's abundant outdoor recreation assets. The full relocation package is valued at more than \$20,000 and can be viewed at www.ascendww.com.

RVA757

Ohio's Economic Development Effort's Focus on recruiting talent:

Videos Pushed through Social Media



https://www.youtube.com/watch?v=THjlxSsPyiY

Postcard Mailers



RVA757

111

Breakout questions related to our study to date

• • •

- How do we better attract and retain talent?
- How can we bring RVA757 Connects' collaboration to support and grow opportunity industry clusters?



113

Breakout Session 3 Topic Areas

• • •

1. Comments and suggestions on today's meeting content:

What's working best so far? Create a quick list, limit discussion.

Where do we need more attention? Create a quick list, limit discussion.

Discussion: Size of Board of Directors and future role of Innovation Council and Higher Education Council.

Board: 75 seats - approximately 35 senior leaders from each market.

MIC – Megaregion Institutional Council – chambers, community foundations, planning district commissions, workforce councils, economic development agencies, business roundtables, etc.

Innovation Council (starts in 2022): Up to 125 creative, very diverse individuals who identify topics and ways to advance our megaregion. Provides input to Board.

Education Council (starts in 2022): The I-64 Innovation Corridor's institutions of higher education. This group identifies topics and ways to increase collaboration that advances our megaregion. Provides input to Board.

RVA757

Breakout Session-continued

• • •

2. Leveraging RVA757 Connects' marketing communications efforts:

What do you like the most about our marketing? What's missing? Create a quick list, limit discussion.

How can we best engage you – to sign up and follow us, link to our social media pages, proactively provide innovation stories? Create a quick list, limit discussion.

3. Input on the I-64 Innovation Corridor Talent Study:

Discussion: How do we better attract and retain our talent? How can we best support the new RVA NOW and Campus757 organizations?

Discussion: How can we bring our RVA757 Connects' "collaborative spirit" to support our economic development agencies in growing key industry clusters – creating new jobs?

RVA757

115



Our "To Do" List

...

- 1. Post a copy of this meeting deck on the new Documents portal.
- 2. Provide a recap of the breakout session in one week.
- 3. Keep working on our priorities.
- 4. Send out an email that you can forward to invite people to follow us.

RVA757

117

Your "To Do" List

•••

- 1. Provide names for potential board directors.
- 2. Provide "innovation" stories to Laura at least one per director and MIC member.
- 3. Invite people to follow us your key employees and colleagues.
- 4. Link to our social media.

RVA757



5. **Ask Our** State-level Elected Officials and **CTB Members** to Support the **I-64 Gap Project**

RVA757

119

6. **Join Others** in Supporting **RVA757 Connects**











- Wilson H. Flohr, Jr.
- Thomas R. Frantz











- Mitch Haddon
- Sarah Jane Kirkland
- John Reinhart

RVA757

7. Make sure you have the remaining key dates on your calendar.

Future Board/MIC Meetings

September 15th 2 pm – 4 pm December 8th 12 pm – 2 pm

Events

October 1st 11:30 am - 1:00 pm Virtual Forum - Our Global Internet Hub

We will discuss how the business community can better utilize and understand the powerful assets we have in the region when it comes to broadband infrastructure.

October 27th 9:30 am - 3:30 pm - Convergence 2021

Hampton Roads Chamber and ChamberRVA will be hosting an in-person event to showcase the work of RVA757 Connects.

New Directors' Orientation (Virtual)

July 1st 7:45 am - 8:45 am

One-hour background overview of RVA757 Connects.



121

RVA757

Thank You!





