

ONE MACON! OUR VISION, OUR FUTURE.

COMPETITIVE ASSESSMENT

Submitted by *Market Street Services Inc.*
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INTRODUCTION

In January 2014, the City of Macon and Bibb County will consolidate into a singular entity – Macon-Bibb County. This will be the formal culmination of decades of work toward consolidation, which finally paid off in July 2012 when voters from each jurisdiction endorsed the change. As the story of consolidation has unfolded, Macon-Bibb and the rest of the nation have also been recovering from the Great Recession, the worst economic downturn in generations. Today, Macon-Bibb is on the cusp of a new era, one in which unprecedented levels of unity and cooperation will be possible. To ensure that this momentous occasion is not squandered, Macon-Bibb and its leaders must have a clear plan to improve its position in a global economy where competition is ever-increasing.

To this end, a group of partners throughout the community have initiated a collaborative process – *One Macon! Our Vision, Our Future.* – to establish a new Community and Economic Development Strategy, designed to unify the community around a consensus vision for its future. It will provide Macon-Bibb's leaders in the public, private, and non-profit sectors with a clear understanding of the community's competitive assets and key strengths, weaknesses, challenges, and opportunities. The assessment of these factors will inform the creation of a comprehensive Community and Economic Development Strategy that will guide the community's efforts during the next five years as it seeks to improve its overall prosperity. This Competitive Assessment represents the first phase of the strategic planning process, presenting a thorough review of the competitive issues facing Macon-Bibb.

PROJECT OVERVIEW

The nine-month *One Macon!* strategic planning process includes stakeholder input, quantitative research, the development of strategic recommendations, the creation of an implementation plan, and the establishment of performance metrics to measure implementation success.

COMPETITIVE ASSESSMENT

This Competitive Assessment evaluates Macon-Bibb's competitiveness as a place to live, work, visit, and do business. The community's performance is measured by a variety of demographic, socioeconomic, economic, and quality of life indicators, and is benchmarked against four peer counties with which Macon-Bibb competes for jobs and workers. This quantitative data is complemented by qualitative stakeholder input gathered through focus groups, one-on-one interviews, and an online community survey. This research is synthesized to communicate the key stories that impact Macon-Bibb's competitiveness, which inform the initiatives to be outlined in the Community and Economic Development Strategy.

TARGET BUSINESS ANALYSIS AND MARKETING REVIEW

The Target Business Analysis identified those sectors of economic activity within Macon-Bibb County that should be strategically targeted by proactive economic development programs and policies in the years to come. The analysis of each target sector included a discussion of national trends, business sector composition, occupational composition, workforce demographics, export potential, and inter-industry linkages. The strategic implications of key findings were discussed for each target. This analysis was complemented by three other pieces of research that inform the Community and Economic Development Strategy. First, a Marketing Review examined the effectiveness of Macon-Bibb's current targeted marketing efforts. Second, an Incentives Review evaluated the range of local, regional, and state-level incentives that affect the community's ability to develop and market existing target business sectors. And third, a Site Assessment, performed by nationally renowned site selector J. Michael Mullis, examined the suitability of Macon-Bibb's existing industrial parks and sites.

ONE MACON! COMMUNITY & ECONOMIC DEVELOPMENT STRATEGY

The culmination of the first two phases of this process is an action-oriented, measurable Community and Economic Development Strategy for Macon-Bibb County's leaders. The strategy should unify the community's various organizations and institutions in the public, private, and non-profit sectors around a consensus blueprint to move the community forward. Its goals and action steps are grounded in reality as determined through the research gathered in the first two phases of the process, but also shaped by the vision of what Macon-Bibb "wants to be," as articulated by the Steering Committee and stakeholder input participants.

ONE MACON! IMPLEMENTATION GUIDELINES

If the Strategy represents **what** Macon-Bibb needs to do, the Implementation Guidelines helps identify **how** that will be done. The Implementation Guidelines will prioritize actions, examine funding capacity and sources, and identify the lead and supporting entities that will be charged with implementing individual recommendations. It will present detailed action plans for establishing early momentum and catalyzing support, and will include a set of performance metrics against which progress can be measured.

STEERING COMMITTEE

The strategic planning process is guided by a diverse Steering Committee of leaders from the public, private, and non-profit sectors. These individuals will oversee the entire planning effort, help identify Macon-Bibb's strategic priorities, build consensus, and serve as public advocates for the betterment of the community and its economic development.

Committee Member

Kathryn Dennis (tri-chair)
 Robbo Hatcher (tri-chair)
 Cliffford Whitby (tri-chair)
 Stephen Adams
 Virgil Adams
 Jonathan Alderman
 Ivan Allen
 Donald Bailey
 Leonard Bevill
 John Black
 Charles Briscoe
 Larry Brumley
 Isaac Culver
 Jason Delves
 Mike Dyer
 Roy Fickling
 Michael Ford
 Kirby Godsey
 Chairman Samuel Hart, Sr.
 Heather Holder
 David Lanier
 George McCanless
 Major General Robert McMahon (Ret.)
 Walter Miller
 Alex Morrison
 June Parker
 Billy Pitts
 Starr Purdue
 Mayor Robert Reichert
 Rudell Richardson
 Steve Rickman
 Josh Rogers
 Tony Rojas
 Ninfa Saunders
 Chris Sheridan
 Monica Smith
 Steve Smith
 Dan Speight
 David Thompson
 Pearlie Toliver
 Patrick Topping
 Stewart Vernon
 Thomas Wicker

Representing Organization

Community Foundation of Central Georgia
 H2 Capital; Macon Economic Development Commission
 Whitby Inc.; Macon-Bibb County Industrial Authority
 Macon-Bibb County Industrial Authority
 Adams & Jordan, P. C.
 Anderson, Walker, & Reichert, LLP
 Middle Georgia Technical College
 The Telegraph
 Macon Occupational Medicine, LLC
 Middle Georgia State College
 Coliseum Health System
 Mercer University
 Progressive Consulting Technologies
 BLC Hardwood Flooring, LLC
 Greater Macon Chamber of Commerce
 Fickling & Company, Inc.
 NewTown Macon
 Mercer University
 Bibb County Board of Commissioners
 College Hill Alliance
 BB&T Bank
 United Way of Central Georgia
 Twenty First Century Partnership
 GIGA Inc.
 Macon-Bibb County Urban Development Authority
 Macon Housing Authority
 The Mutual Financial Group
 Hutchings Funeral Home, Inc.
 City of Macon
 Richardson Tax & Accounting
 Macon Water Authority Board
 Historic Macon Properties, LLC
 Macon Water Authority
 Medical Center of Central Georgia
 Chris R. Sheridan & Company
 Macon-Bibb County Convention & Visitors Bureau, Inc.
 Bibb County Schools
 State Bank and Trust Company
 Piedmont Construction Group, LLC
 Macon Housing Authority
 Macon Economic Development Commission
 ASP Franchising, Inc.
 Georgia Power

COMPETITIVE ASSESSMENT

This assessment examines the competitive issues facing Macon-Bibb by evaluating them through the prism of what *Market Street* believes to be the three critical aspects of a community: its **people**, their **prosperity**, and the quality of **place**. Findings related to these key attributes are incorporated into nine key stories that identify the most important issues impacting Macon-Bibb's competitiveness.

These stories represent themes that emerged both through in-depth data analysis and from extensive feedback provided by Macon-Bibb's residents and business and community leaders. **From this research, it is apparent that Macon-Bibb is blessed with a strong set of assets that, taken together, are exceedingly rare for a community of its size. It is also clear that the community faces numerous challenges.** Macon-Bibb's troubles are in many cases severe, and attempting to sugarcoat them or understate their significance would be a disservice to this process and to the residents, businesses, and leaders of Macon-Bibb. **A variety of issues from stagnant population growth, persistent out-migration, a troubled public school system, generational poverty, and an economy still reeling from the Great Recession all threaten the future prosperity of the community. Interwoven throughout each of those challenges are pervasive issues of race, leadership, and trust that have in the past exacerbated problems and stymied progress.** But while these challenges are immense, Macon-Bibb is in a special position to address them in a meaningful way. The impending consolidation of the City of Macon and Bibb County governments represents an important opportunity to build momentum, and the community's aforementioned assets – among them its institutions of higher education, strong health care sector, transportation infrastructure, and advantageous location – form a solid foundation capable of supporting dynamic growth. These challenges and assets are no secret to Macon-Bibb's residents; they understand the community, its obstacles, and its potential.

This strategic planning process is intended to complement many existing efforts in the community that seek to overcome these challenges and leverage these assets for the betterment of the community's residents and businesses. The first step in this process is taking stock of conditions as they presently exist. The Competitive Assessment that follows will provide greater detail on the challenges facing Macon-Bibb and the assets that support its economic competitiveness. A few technical notes are necessary to provide context for the remainder of this assessment.

Geographies

When the City of Macon and Bibb County formally consolidate in 2014, the borders of the new jurisdiction will match those of present-day Bibb County. As such, the primary geography for this research is Bibb County. To reflect the upcoming unification, this geography is referred to as "Macon-Bibb" throughout this deliverable. In some instances, it was necessary or beneficial to analyze data for a larger geography – either the five-county Macon Metropolitan Statistical Area or the seven-county Macon-Warner Robins-Fort Valley Combined Statistical Area, the latter of which provides the most accurate picture of the "labor shed" surrounding Macon-Bibb.

Throughout the Competitive Assessment, Macon-Bibb will be benchmarked against four other counties with which it competes for jobs and workers. These counties are:

- ✓ **Augusta-Richmond County, Georgia:** This County of more than 202,000 residents shares many common characteristics with Macon-Bibb. Augusta-Richmond has a consolidated government and is the core county of a mid-sized metro area along the Fall Line in Georgia that shares many common historical and demographic traits. It is located in close proximity to Fort Gordon and is home to educational assets such as Georgia Regents University and its Medical College of Georgia.
- ✓ **Columbus-Muscogee County, Georgia:** Columbus-Muscogee is also similar in nature to Macon-Bibb and Augusta-Richmond with respect to its location, government, and history. It is also home to Fort Benning and Columbus State University, in addition to corporate citizens such as Aflac and TSYS. In 2012, the population of Columbus-Muscogee was just shy of 200,000.
- ✓ **Lee County, Alabama:** Lee County is located in eastern Alabama on the Georgia border and has a population of nearly 148,000 as of 2012. In addition to being home to Auburn University and its student body of more than 25,000, the county is also located in close proximity to Columbus-Muscogee and the Kia Motors automobile manufacturing facility in West Point, Georgia. Its primary cities are Auburn and Opelika.
- ✓ **Montgomery County, Tennessee** Montgomery County is also a principle city of a mid-sized Southern metro. Located in northern Tennessee along the Kentucky border, its principle city is Clarksville, TN. Like Macon-Bibb, it is heavily influenced by the presence of higher education resources (Austin Peay State University) and a military base (Fort Campbell) located approximately 10 miles from downtown Clarksville, just across the Kentucky line.

In addition to these four counties, conditions in Macon-Bibb have also been compared to state and national trends to provide further context to the data.

Focus Groups and Interviews

A thorough assessment of a community's strengths, weaknesses, opportunities, and challenges must be informed by qualitative input in addition to quantitative data. Accordingly, *Market Street* conducted a series of focus groups and one-on-one interviews in Macon-Bibb to solicit input from residents, businesses, educators, and community leaders. This input is critical to the research and strategic planning process, and it has been summarized and incorporated into this assessment as appropriate.

Online Survey

In addition to in-person input solicited via focus groups, interviews, and discussions with the Steering Committee, an online community survey was open to the public for four weeks. This survey, which received nearly 600 responses, provided important insight into a variety of issues and will be used to inform the creation of the Community and Economic Development Strategy. **Brief summaries of input gathered through focus groups, interviews, and the online survey are presented in red text throughout this research deliverable.**

RACE, LEADERSHIP, AND TRUST

This Competitive Assessment is a detailed examination of the factors that influence the overall attractiveness of Macon-Bibb as a place to live, work, and do business. It touches on a broad range of topics – from education to the economy to quality of life. Macon-Bibb has many strengths in these areas. But where there are weaknesses, they are almost always affected to some degree by three common themes. **According to a broad range of stakeholders, these are race, leadership, and trust.** Community input participations repeatedly emphasized that Macon-Bibb has a history of racial difficulties – primarily involving its black and white residents – that touch all aspects of life. Among the most heavily impacted areas are politics and government, where residents indicated that racial tensions have too often combined with self-interest to thwart attempts at progress in a variety of ways. According to residents, these issues have in turn created an environment of mistrust that serves to divide the community even further.

The preceding observations should not come as a surprise to anyone who has spent a significant amount of time in Macon-Bibb. These are well-known, complex, and painful issues with deep roots. But they are mentioned here – at the beginning of this assessment – not to belabor the point but to call attention to two important facts. First, in addition to their own inherent unpleasantness, these issues act as significant impediments to economic growth. Because they permeate so many aspects of local life, they cannot be set aside in a discussion on how to create wealth and prosperity across the entire community.

Second, Macon-Bibb is at a turning point – one that is unlike any other in its history. In July 2012, voters in the City of Macon and Bibb County ended decades of debate and approved a consolidation of their two governments. This unification process will involve many changes, but perhaps most importantly, it reflects a time in which Macon-Bibb can move beyond *talking* about issues of race, leadership, and trust and to begin taking *actions* that will hopefully bring meaningful improvement in trust among residents, among elected leaders, and between residents and their elected leadership.

While Macon-Bibb's population has diversified somewhat in recent years, the community is still overwhelmingly made up of individuals from two racial groups – black and white. In 2011, Macon-Bibb's population was 52.0 percent black and 41.8 percent white. This distribution is similar in the two Georgia counties to which Macon-Bibb was compared. Augusta-Richmond is 53.5 percent black and 38.0 percent white, while Columbus-Muscogee is 44.9 black and 43.5 white with a growing Hispanic population making up 6.7 percent of the population.

While Macon-Bibb is a "majority-minority" community, it is actually relatively less diverse than the state of Georgia as a whole because its Hispanic and Asian populations are much smaller than the state averages. But these groups are growing in Macon-Bibb. Between 2001 and 2011, the community's Hispanic population exactly doubled, from 2,390 to 4,780 residents. Its Asian population also increased by 51.5 percent, to 2,590 residents. While these groups were experiencing rapid growth rates that outpaced the corresponding national rates of growth, Macon-Bibb's white population declined rapidly, losing 12.7 percent between 2001 and 2011 – a raw decrease of 9,480. What little population growth the community experienced was driven by growth in non-White populations. Between 2001 and 2011, Macon-Bibb's black population rose by 8,210, an 11.2 percent increase.

As the white population declined throughout the previous decade, the level of geographic separation between white and black residents of Macon-Bibb began to increase. The “U.S. 2010” program is a joint effort between the Russell Sage Foundation and Brown University that tracks changes in American society. One of the metrics the program provides is a “Dissimilarity Index,” a measure which describes how many people of a given racial group would have to move in order to ensure that every census tract within a metropolitan area matched the overall racial and ethnic composition of the region. The index is measured on a scale of 0 to 100, with a score above 60 indicating very high segregation, while a score of 40-60 indicates moderate levels of segregation. Data is not available at the county level, so it is necessary to use city- and MSA-level data as a proxy. In the five-county Macon metropolitan area in 2010, the dissimilarity index score for white and black residents was 51.1. This is a moderate level of segregation but higher than measurements in the metro areas that contain Augusta-Richmond, GA (44.6), Lee County, AL (33.7), and Montgomery County, TN (39.3). Only the MSA containing Columbus-Muscogee had a higher dissimilarity index (54.8), indicating that it possessed a higher level spatial segregation than Macon-Bibb. However, within the City of Macon, things are even more segregated. In 2010, the city’s dissimilarity index for white and black was 54.8 – at the high end of the moderate range and a marked increase over its level of 48.2 in 2000. So while much progress has been made from a generation ago – the City of Macon’s dissimilarity index in 1980 was 61.6 – the core of Macon-Bibb is once again becoming more spatially segregated.

This is consistent with feedback received through the input process. Participants frequently described Macon-Bibb as a segregated place – socially, economically, geographically, and in public schools and places of worship. A narrow majority of white survey respondents (54.6 percent) agreed that Macon-Bibb is “an inclusive, welcoming place where a diverse range of people can find a home community.” But among black respondents, only 39.6 percent agreed with this statement. Many participants said that when newcomers and visitors arrive in Macon-Bibb, they feel as if they have been “transported back several decades” to a more racially divided time in America’s history. Said one participant, “There is much more racial division and animosity than one would expect anywhere in the year 2013, and it seems to be focused not in the populace, but in the leadership of Macon-Bibb County.” This was a common theme related throughout input: racial tensions seem to play out most frequently – and most publicly – in politics and government. Input participants said that Macon-Bibb’s leadership, both white and black, exploits an “us vs. them” mentality to hold on to power while problems go unsolved and divisions go unhealed. As one participant stated, “With politics, it’s always race. And when it’s not race, it’s blamed on race.”

Throughout the input process there was broad agreement among participants that Macon-Bibb’s racial issues are well-known and have been publicly discussed *ad nauseam*. Many expressed hope that the upcoming consolidation process could help the community make progress on these issues. Many participants hoped that race would be deemphasized in local politics simply by virtue of having fewer elected officials. However, others expressed some skepticism that change would be immediate. Said one, “We are fooling ourselves if we think things will be markedly different right away.” The ongoing controversy related to the structure and timing of the first elections in a consolidated Macon-Bibb lend support to this concern. But if Macon-Bibb is to make progress on issues of race, trust, and leadership, there is no better time than during this momentous transformation of the community’s governance. Seizing this opportunity is of critical importance, as any improvements made on this front will have a positive impact across nearly every issue that follows in this report.

GROWTH PATTERNS, FISCAL SUSTAINABILITY, AND WORKFORCE SUSTAINABILITY

While the racial and ethnic composition of Macon-Bibb's populace changed between 2000 and 2012, the overall size of its resident population changed little. During this 12-year stretch, the county grew by just 2,600 residents, an increase of 1.7 percent. This slow growth stands in stark contrast to broader regional and national trends, particularly those observed across the rapidly-growing Sunbelt. During this same time period, Georgia's population increased by 20.6 percent, outpacing the national growth rate of 11.3 percent. **Simply put, population growth in the new millennium has been characterized by stagnation, continuing a trend that dates back to the 1980s in Macon-Bibb County.**

FIGURE 1 – POPULATION GROWTH, 2000-2012

	Population			Raw Change		Percent Change	
	2000	2007	2012	2000-12	2007-12	2000-12	2007-12
Macon-Bibb	153,860	154,290	156,460	2,600	2,170	1.7%	1.4%
Augusta-Richmond	199,550	196,480	202,590	3,040	6,110	1.5%	3.1%
Columbus-Muscogee	186,480	184,700	198,410	11,930	13,710	6.4%	7.4%
Lee, AL	115,430	131,930	147,260	31,830	15,330	27.6%	11.6%
Montgomery, TN	135,540	160,640	184,470	48,930	23,830	36.1%	14.8%
Georgia	8,227,300	9,349,990	9,919,940	1,692,640	569,950	20.6%	6.1%
United States	282,162,410	301,231,210	313,914,040	31,751,630	12,682,830	11.3%	4.2%

Source: U.S. Census Bureau Current Population Estimates; Moody's

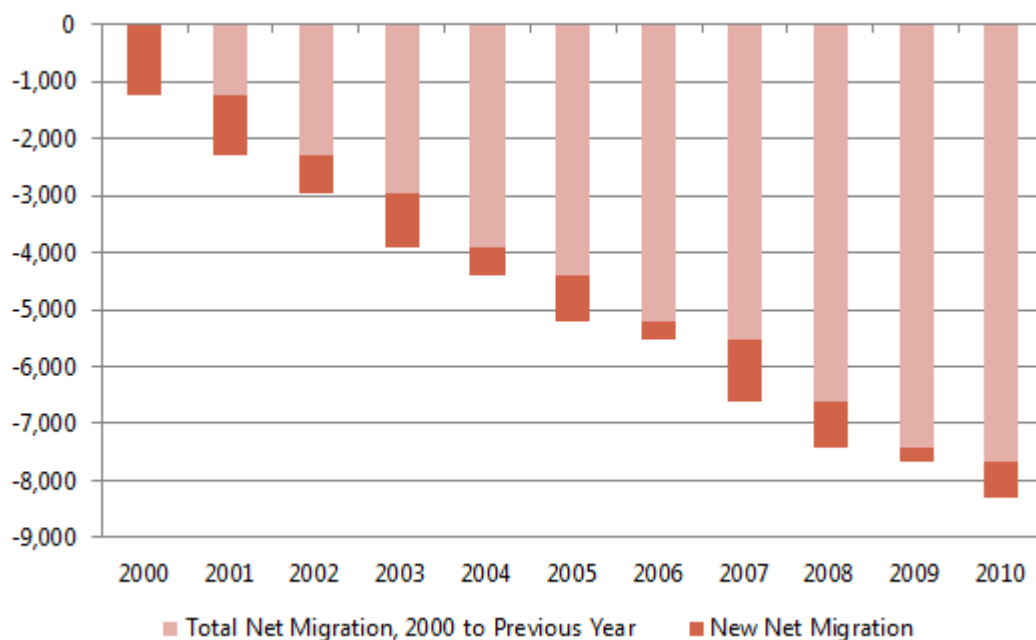
However, Macon-Bibb was not entirely alone in this respect. Like Macon-Bibb, Augusta-Richmond and Columbus-Muscogee missed out on the rapid population growth sweeping Georgia in the 2000s. Between 2000 and 2012, Augusta-Richmond grew at an even slower rate – 1.5 percent – than Macon-Bibb, while Columbus-Muscogee lost population for three consecutive years beginning in 2000. But towards the latter half of this time period, both began to experience accelerated growth compared to Macon-Bibb. Between 2007 and 2012, Augusta-Richmond's population increased by 3.1 percent, while Columbus-Muscogee added a robust 7.4 percent – higher than both the state (6.1) and national (4.2) growth rates for this time period. By contrast, Macon-Bibb's grew by just 1.4 percent. The two other comparison communities – Lee, AL and Montgomery, TN – typified the rapidly expanding Southeastern exurbs between 2000 and 2012, growing by 27.6 and 36.1 percent, respectively.

By examining data from the U.S. Census Bureau covering the components of population change, it becomes apparent why Macon-Bibb's growth was flat. Between 2010 and 2012, the most recent time period for which data is available, the county added 1,586 residents through a "natural increase" – the net difference between births and deaths. But Macon-Bibb's total population grew by just 915. The reason for this discrepancy is a trend referred to as net out-migration. From 2010 to 2012, the county lost a net total of 687 residents to other communities; that is, 687 more people moved out of Macon-Bibb than the number of new residents that moved in to Macon-Bibb.ⁱ But even this number does not tell the full story because it is propped up by a net increase of 440 international in-migrants from other countries. Removing

this group from consideration shows that in just 27 months, Macon-Bibb lost a net total of 1,127 residents to other counties in the United States.

A review of IRS migration data reveals that this is a pronounced, long-running trend. Between 2000 and 2010, Macon-Bibb lost a net 8,285 residents to out-migration. Most of the individuals who have left have not gone far – many settled in a county within the Macon-Warner Robins-Fort Valley Combined Statistical Area (CSA), which in addition to Macon-Bibb includes Crawford, Houston, Jones, Monroe, Peach, and Twiggs counties. Between 2000 and 2010, Macon-Bibb lost 6,216 residents to these counties, including 2,412 to Houston, 1,712 to Jones, and 1,105 to Monroe. Macon-Bibb lost population to every CSA county except Twiggs, from which it gained a net of just two in-migrants.

FIGURE 2 – NET OUT-MIGRATION, 2000-2010



Source: Internal Revenue Service; Moody's

As a whole, the seven CSA counties including Macon-Bibb attracted 13,774 net in-migrants between 2000 and 2010. Much of this growth has been centered in Houston County, which added 16,661 net new residents during the decade, more than 10,000 of which came from outside the seven-county region. The presence of Robins Air Force Base has unquestionably been a primary driver of this growth.

Online survey participants who indicated that they had previously lived in Bibb County but now reside elsewhere cited schools, crime, property taxes, and the availability of real estate and land as influential factors in their decision to relocate. Input participants described a dilemma of “unacceptable” public schools in Macon-Bibb, to which the only alternatives are enrolling children in private schools that can stretch the budget of a middle-income family or moving to a county with a better school system. Said one

participant, "It creates a bifurcated community, where the well-to-do are OK, and the less well-to-do just get a less-adequate education. Then the middle class moves away – to Forsyth, Jones, or Houston." Another participant suggested that families with young children often make this move reluctantly: "People are dedicated to Macon but are moving for schools." As for newcomers to the community, input participants related experiences with real estate agents and employers steering new families with children away from Macon-Bibb in favor of other counties, such as Houston, with strong school systems.

These and other possible explanations as to *why* people are leaving Macon-Bibb will be explored throughout this deliverable. The remainder of this section, however, focuses on two key implications of this out-migration trend: its threat to Macon-Bibb's fiscal sustainability and its workforce sustainability.

Fiscal Sustainability

Addressing some of Macon-Bibb's biggest challenges – school quality, crime, etc. – will require significant investment from the public sector, but making this commitment could become more difficult precisely *because of* out-migration. Local governments receive the majority of their revenue from property and sales taxes – in Fiscal Year 2012, these sources accounted for 59.5 percent of the City of Macon's revenue, while in Bibb County, this figure was 80.2 percent. **But a shrinking population could threaten this tax base. In theory, a decrease in population will necessarily lead to a reduction in demand for housing and other consumer goods, which will in turn lead to a decline in tax revenues. Of course, communities do not function in a vacuum – they are part of regional, national, and global economies.** An individual who moves from Macon to Warner Robins may still shop in and pay sales taxes to Bibb County, while home values are subject to many exogenous factors such as mortgage lending standards in addition to local factors.

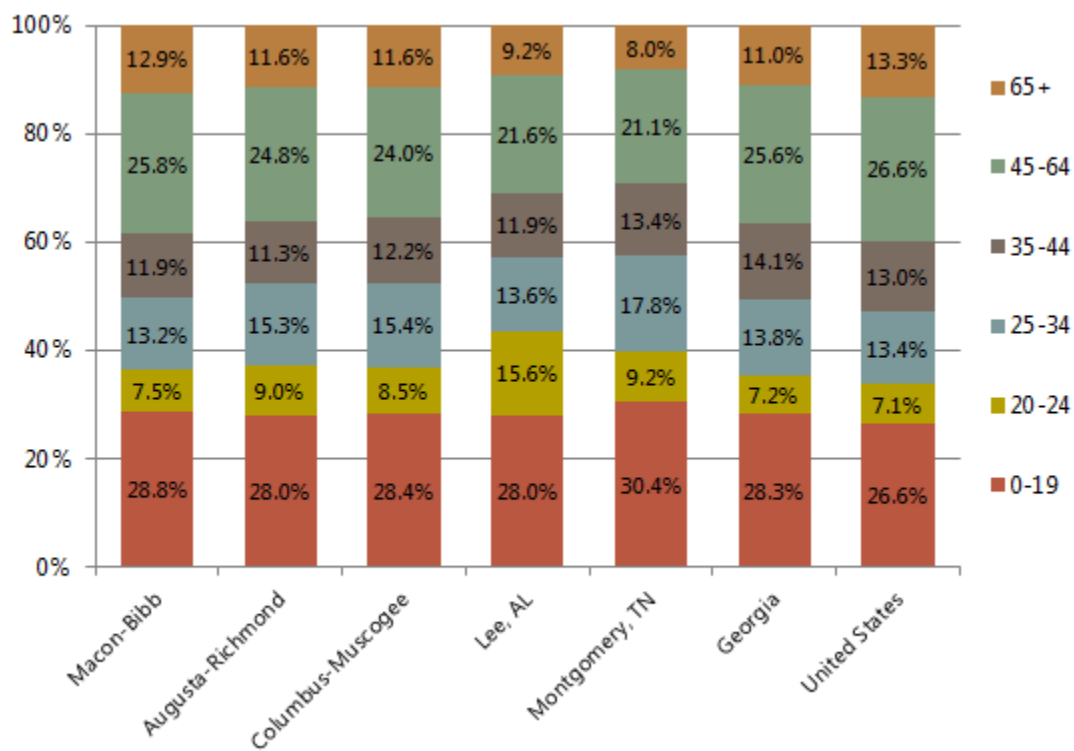
But as a general principle, net out-migration is a threat to a community's fiscal sustainability. Of particular concern is the potential for a "negative feedback loop" wherein out-migration leads to a decline in revenue and further deterioration of public services, which in turn drives more out-migration, and so on. Fortunately, the impending consolidation of the City of Macon and Bibb County governments should help matters. Executed properly, consolidation should lead to greater governmental efficiency, easing budgetary pressures. **But in the long run, it is essential to view net out-migration as a threat – both for the direct problems it creates and its impact on the community's ability to address other major challenges such as schools, crime, and beautification.**

Workforce Sustainability

In addition to the fiscal considerations described above, persistent net outmigration may also have negative repercussions for the sustainability of Macon-Bibb's workforce. Communities across the country are beginning to face the challenge posed by the aging of the Baby Boom generation. As these workers with decades of experience retire, communities must be able to supply – or attract – enough talented young workers to replace them. Those that do not will face workforce shortages that could have serious consequences for the local and regional economy. Complicating matters further is the fact that many jobs currently staffed by Baby Boomers, such as manufacturing occupations, tend to be less attractive to younger workers.

In examining the potential threats posed by outmigration on the sustainability of community's workforce, it is important to understand the age composition of the community's population and workforce. In 2011, 26.6 percent of the United States population was between 45 and 64 years of age (the cohort that roughly approximates those that are or will be approaching retirement age in the coming decade). That is just slightly more than the 26.4 percent of individuals between the ages of 25 and 44 (the cohort that roughly approximates those that will be expected to take on more senior positions and replace impending retirees in the decade to come). Across the United States, a continued influx on international immigrants will ensure that there are enough younger workers to replace those who will be retiring over the course of the next decade.

FIGURE 3 – AGE DISTRIBUTION, 2011



Source: U.S. Census Bureau Current Population Estimates; Moody's

In Macon-Bibb, the dynamics are somewhat similar to the national figures – 25.8 percent of the population is between the ages of 45 and 64, while 25.1 percent is aged 25-44. While that figure is not itself alarming, it becomes a concern when viewed in comparison with the demographic makeups of the benchmark counties, the state, and the characteristics of many other competing communities in the Southeast. Generally speaking, most metropolitan areas in the South possess relatively young workforces, characterized by a 25-44 population that exceeds the 45-64 population. This is true for each of the four comparison communities as well as the state. In Georgia, younger workers aged 25-44 outnumber impending retirees aged 45-64 by 2.3 percentage points, while in the comparison counties this spread

ranges from 1.8 percentage points in Augusta-Richmond to 10.1 percentage points in Montgomery, TN. **From a purely numerical standpoint, these communities will have enough younger workers to replace the approaching wave of retirees, even if they do not attract any outsiders through net in-migration (domestic or international). The same cannot be said for Macon-Bibb, a community with disadvantageous age composition and characterized by persistent net out-migration.**

However, the sustainability of Macon-Bibb's workforce is not solely reflected in local (county-level) data, but also in regional characteristics of the surrounding metropolitan area that more closely approximates the "labor shed" for Macon-Bibb employers. This labor shed – the area from which the county's business can draw talent – is best approximated by the seven-county Macon-Warner Robins-Fort Valley CSA. In the CSA, older workers outnumber younger workers 26.5 to 25.6 percent – a wider margin than is found in Macon-Bibb alone. This reinforces the troubling age composition found in Macon-Bibb.

While the region's age dynamics may create difficult conditions in the local economy as a whole, certain businesses will likely face more immediate challenges. In the second quarter of 2012, 18.9 percent of individuals who were employed at Macon-Bibb establishments were 55 or older, as compared to 18.6 percent statewide. But in certain key business sectors, this number is much higher. In wholesale trade, 21.2 percent of workers are 55 or older. This figure is 22.2 percent in manufacturing, 24.5 percent in professional, scientific, and technical services, 24.7 percent in transportation and warehousing, and 29.2 percent in educational services. In each of these sectors, Macon-Bibb has a higher percentage of workers near retirement than the state average. The finance and insurance (11.9 percent in Macon-Bibb vs. 18.3 percent statewide) and the healthcare and social assistance (18.5 percent vs. 19.5 percent) sectors are the primary exceptions whereby the percentage of workers aged 55 or older is lower in Macon-Bibb than the statewide average, indicating that the average establishment in these sectors in Macon-Bibb will face fewer demands in replacing impending retirees than the average establishment in these sectors across the state. Establishments in nearly all other sectors will face greater difficulty than the average establishment across the state in terms of finding replacements for impending retirees.

But recall that age composition is only one factor in determining workforce sustainability. Communities and regions with consistent and high rates of net in-migration can overcome disadvantageous age dynamics by attracting more new residents from outside the community than the number of existing residents that choose to move elsewhere. While Macon-Bibb has consistently experienced net out-migration, recall the picture looks much better on the regional level – the area that more closely approximates Macon-Bibb's true labor shed. But because this growth has been centered in Houston County, it is reasonable to assume that Robins Air Force Base is the primary attractor of new residents – both military and civilian. Although a tremendous asset, the future status of the base and its ability to continue to support net in-migration of new residents will be subject to review by a future Base Realignment and Closure Commission (BRAC), possibly as soon as 2014, in addition to other non-BRAC budget pressures such as the sequester at the federal level.

While there is a bright spot in regional in-migration trends, few "core counties" in the Southeast have experienced the kind of negative out-migration that Macon-Bibb has since 2000, and few metropolitan regions in the Southeast have similarly disadvantageous age dynamics. Workforce sustainability is therefore a concern – one that could grow in the coming years if current trends continue. Fortunately,

many communities have overcome these workforce challenges, including some with much greater challenges than Macon-Bibb and many fewer assets to leverage. They have done so by attracting new people to the community and retaining current residents. Macon-Bibb and the larger region must therefore work to attract and retain workers at a higher rate. This requires a comprehensive and dedicated effort to address the challenges highlighted in this report that inhibit the community's attractiveness as a place to live, work, and do business. If the community's and region's leadership fail to do so, the workforce will necessarily remain stagnant or decline, employers will face shortages, and closures will almost certainly follow. This reality highlights the need to engage in tightly focused business retention and expansion (BRE) efforts to determine the workforce needs and concerns of individual businesses in the community. It also underscores the need to make the community as attractive as possible for the type of talented workforce that will be necessary for future success – particularly students, recent graduates, and young professionals.

Attracting new residents – and keeping those that are already here – is absolutely essential to the sustainability of Macon-Bibb's workforce in the years to come. But the importance of producing "homegrown" talent through an educational pipeline cannot be overlooked. Macon-Bibb's performance in this area is mixed. While the public pre-K-12 system is deeply troubled and faces mounting challenges, there are always bright spots and lessons learned within the community and from best practices outside the community that can be adopted in a more widespread manner. Macon-Bibb also has a robust higher education community that provides reason for optimism and is a tremendous asset in generating the aforementioned homegrown talent pipeline. These factors are explored in further detail in the next two sections.

K-12 EDUCATION: A DIVIDED AND TROUBLED SYSTEM

When asked about the biggest challenges in Macon-Bibb, one participant said, "1A and 1B are race and education." This sentiment succinctly summarizes a clear picture that emerged throughout the input process: the K-12 education system is one of the largest and most important challenges in Macon-Bibb, and the issue is inseparable from larger issues of race and class.

In the eyes of many input participants, Macon-Bibb's K-12 education system is better described as two systems divided along racial and socioeconomic lines. According to focus group participants, one is private, predominantly white, and performing at a high level; the other is public, predominantly black, and badly struggling. There are obvious exceptions to this generalization in terms of diversity in both public and private education, but by and large, this characterization reflects the sentiment of input participants. For families that can afford private schools, the system is working well enough, though at a high financial cost. Those families that cannot afford private school are faced with a choice of moving out of the county or enrolling their children in a system where "less than mediocrity" has become the accepted standard. An overwhelming majority of survey participants – 83.7 percent – described the quality of Macon-Bibb's public K-12 schools as a "disadvantage" or "major disadvantage." By comparison, respondents to recent surveys in other *Market Street* client communities in the state of Georgia have evaluated their public school systems much more favorably. Only 11.3 percent and 6.6 percent of respondents in Rome-Floyd County and Cobb County indicated that public schools were a "disadvantage" or "major disadvantage," respectively. With

regards to Bibb County Schools, only 22.8 percent of respondents indicated that they “agreed” or “strongly agreed” with the statement that “children in this district receive a high-quality education.”

Survey respondents mentioned public schools more frequently than any other issues when asked “What is Macon-Bibb’s greatest weakness or challenge to overcome?” The following graphic illustrates these responses when analyzed by Wordle, a text analysis tool that displays words according to the frequency that they were mentioned. Those words that were most frequently mentioned appear the largest.

FIGURE 4 – SURVEY RESULTS: WHAT IS MACON-BIBB’S GREATEST WEAKNESS OR CHALLENGE TO OVERCOME?



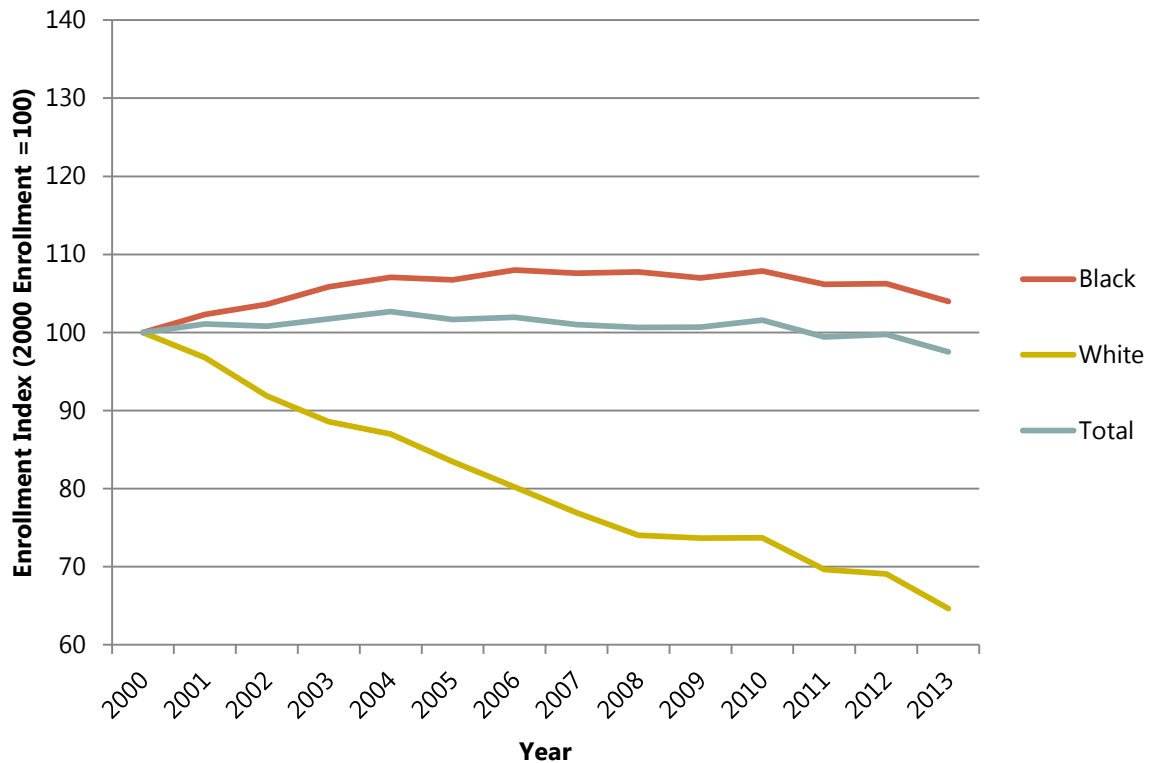
Source: Market Street Services

Acknowledging that a wide variety of factors external to the school system influence student performance and outcomes, from parental involvement to individual aptitude to socioeconomic conditions, data covering student performance and outcomes support the sentiments of residents with regards to the racial and socioeconomic segregation, as well as overall quality.

As of March 2013, the enrollment in Bibb County Schools was 73.2 percent black and 19.5 percent white, with Hispanic and other races and ethnicities comprising the remaining 7.2 percent.ⁱⁱ Trends in the racial and ethnic composition of enrollment mirrors the overall population and migration trends highlighted in previous sections. The number of black students enrolled in Bibb County Schools has increased since 2000, though numbers have declined slightly in recent years. Meanwhile, white enrollment has plummeted. Since 2000, the number of white students in grades K-12 has decreased from 7,008 (29.5 percent of the enrollment) to 4,530 (19.5 percent of total enrollment) – a decline of 35.4 percent. However, this decline in white enrollment is not solely driven by population trends: white enrollment at Bibb County schools is declining at a rate that exceeds the rate of decline in the white school-aged population. Between 2000 and 2010, white enrollment decreased by 26.3 percent compared to a 22.6 percent decline in white residents

between the ages of 5 and 17. As such, out-migration does not fully explain the decline in public school enrollment. Rather, while specific information on private enrollments by race and ethnicity are not available, the data covering population trends and public school enrollment illustrate that a greater proportion of white school-aged children in Macon-Bibb were enrolled in private schools in 2010 than in 2000.

FIGURE 5 – BIBB COUNTY SCHOOLS ENROLLMENT BY RACE INDEX, 2000-2013



Source: Georgia Department of Education

In 2010, there were 8,604 white children between the ages of 5 and 17 living in Macon-Bibb but just 5,165 white students enrolled in Bibb County Schools in grades K-12. Thus, the ratio of white public school students to white children aged 5 to 17 was 0.60. Meanwhile, this ratio for black children was 0.98. These ratios suggest that there are many more white students than black students who live in Macon-Bibb but do not attend its public schools, even after accounting for the differences in the sizes of these two groups. During the input process, individuals with direct knowledge of the enrollment dynamics of private schools described most of them as being overwhelmingly white. However, some private school representatives highlighted their scholarship programs and noted that the diversity of their student body was a source of pride and clear benefit to learning environment.

In addition to race, there is also an evident economic gap between public and private schools. In Bibb County Schools, 77 percent of students are eligible for free and reduced-price meals, a full 20 percentage

points higher than the average for the state of Georgia. This percentage is also higher than Augusta-Richmond (74) and Columbus-Muscogee (62). Simply put, with average annual tuition exceeding \$10,000 at many private schools, private education is cost-prohibitive for a large portion of Macon-Bibb residents. This is true in nearly every American community, but with a considerably larger share of students meeting the income requirements for subsidized lunches than the average system statewide, this gap is exacerbated in Macon-Bibb.

Fortunately, Bibb County Schools avoided a potential crisis in May 2013 when AdvancED, the entity that oversees the accreditation process for the Southern Association of Colleges and Schools, recommended that it be reaccredited. **Some input participants had expressed concerns that the system's accreditation status had been in jeopardy.** This recommendation is likely to be approved by the full AdvancED board in June. The evaluators praised progress in certain areas but also said the district needs special monitoring of its leadership, **which according to input participants has a troubled history.** On AdvancED's rating system of 1 to 4, Bibb County Schools earned a 1.67 in "governance and leadership," though it is not possible to compare that figure across time or to other school districts because the rating system is new this year.ⁱⁱⁱ

While accreditation is critical, Bibb County Schools remain deeply troubled according to residents. The breadth and severity of the systems challenges are evident in a variety of data points that support resident assertions about student outcomes:

Test scores

On the ACT, a national standardized test for college admissions, Bibb County students scored an average of 17.3 in 2010-11, lower than the averages in Augusta-Richmond (17.6), Columbus-Muscogee (19), the state of Georgia (20.6), and the nation (21.1). Between the 2005-06 and 2010-11 school years, the average score in Bibb County Schools dropped by 1.1 points. The average scores in Augusta-Richmond also declined but to a lesser degree (-0.6) while scores in Columbus-Muscogee (+0.9) and the state of Georgia (+0.4) increased. The national average remained unchanged.

Bibb County students also performed poorly on state standardized exams relative to their peers across the state. On the Criteria Referenced Competency Tests administered to eight graders (CRCT-8), the percentage of Bibb students achieving a "pass" or a "pass plus" trailed state averages by a wide margin – three percentage points in Reading, eight in English/Language Arts, nine in Mathematics, 19 in Social Studies, and 27 in Science. The proportion of Bibb students meeting or exceeding standards did increase relative to the state average in Reading and Mathematics between 2005-06 and 2010-11, but the district lost ground in English/Language Arts, Social Studies, and Science. In the latter two subject areas, Bibb County suffered double-digit percentage point losses relative to Georgia as a whole.

On the Georgia High School Graduation Tests (GHSGT), Bibb County Schools had the lowest percentage of students achieving a "pass" or "pass plus" on each of the test's four sections among the Georgia comparison geographies (Augusta-Richmond, Columbus-Muscogee, and statewide). The proportion of Bibb students earning a passing score or better trailed the state average by six percentage points in English/Language Arts, nine in Science, 15 in social studies, and 16 in Mathematics. Additionally the percentage of Bibb County students meeting or exceeding standards decreased on three sections (English/Language Arts, Mathematics, and Social Studies) relative to the state average between 2005-06

and 2010-11. Bibb students made progress on the Science section during this time period, but the achievement gap remains large - with just 83 percent who earned a pass or pass plus on the test compared to 92 percent statewide.

Graduation and dropout rates

While state and national test scores hint at widespread problems at the high school level in Bibb County Schools, graduation and dropout rates reveal the true severity of the situation as the receipt of a high school diploma has a considerable impact on lifelong earning potential. **In the 2011-12 school year, the graduation rate in all Bibb County Schools was 52.3 percent. This was the fifth-worst rate among the state's 179 traditional school districts and 17.5 percentage points below the state average for all systems (69.7).** And while this rate was a one percentage point improvement over the 2010-11 school year, the gap between Bibb County Schools and the state widened, as the average across all systems in Georgia improved by two percentage points.^{iv} By comparison, schools in Augusta-Richmond posted a graduation rate of 59.2 percent, a 4.6 percentage point increase over one year earlier, while Columbus-Muscogee had a graduation rate of 67.5 percent. Several school districts in the region fared even better, including Jones (70.3 percent), Houston (75.6 percent), and Monroe (79.8 percent). Within the district, only one of the seven high schools for which data was available had a graduation rate above the state average – the William S. Hutchings Career Center at 71.6 percent. No other school had a graduation rate above 65 percent, and three – Northeast, Southwest, and Westside – had graduation rates below 50 percent. Five high schools did post year-over-year gains, but the district average was heavily impacted by significant declines at Westside and Northeast, where rates fell 5.2 and 4.7 percentage points, respectively. While data covering graduation rates by race/ethnicity is not available, it is reasonable to assume that there is some correlation between recent enrollment trends by race/ethnicity and declining graduation rates at particular schools, indicative of a potentially wide gap in graduation probability along racial/ethnic lines. Such a gap is present at the state-level, with white students graduating at a rate that was roughly 16 percentage points higher than their black peers in 2011.

As is expected in a district with such a poor graduation rate, Bibb County Schools also have a high dropout rate. Between 2005-06 and 2010-11, the dropout rate for grades 9-12 hovered between six and eight percent.^v During this time period, dropout rates fell sharply in Augusta-Richmond, down to 2.2 percent from a peak of 6.4 in 2006-07, and Columbus-Muscogee, down to 2.9 from a peak of 4.8 in 2005-06. The state rate has also declined somewhat, from 4.7 in 2005-06 to 3.7 in 2010-11. Meanwhile, the dropout rate in Macon-Bibb was the same in 2010-11 as it was five years earlier – 7.2 percent, having never dropped lower than 6.2 percent at any point during that time period. **Among survey respondents who said they were most familiar with Bibb County Schools, only 4.0 percent agreed that "dropout rates are not a serious problem."**

Total enrollment

During the previous 14 years, a time when enrollments in many districts around the state and region were surging, Bibb County Schools shrank. Between 2000 and 2013, district-wide enrollment for grades K-12 declined by 2.5 percent. As discussed earlier in this section, nearly all of this decline was driven by an enormous drop in white enrollment. Meanwhile, other school districts in the region grew rapidly. Monroe's

enrollment rose 9.8 percent, while gains in Jones and Houston increased by 15.8 and 29.5 percent, respectively. The situation at the K-5 level should be even more alarming for Bibb County Schools. Between 2000 and 2013, enrollment in elementary schools declined 8.4 percent, meaning that enrollments could continue to shrink well into the future as these relatively smaller cohorts work their way through the system. By contrast, K-5 enrollment in Houston County schools grew by 32.4 percent during this time period, with both Jones and Monroe posting smaller gains.

Performance relative to socioeconomic composition

While Bibb County Schools perform poorly across a variety of indicators, it should be noted that students from low-income households tend to fare worse than their peers from higher socioeconomic standings on a variety of academic measures. According to the National Center for Education Statistics, the percentage of students on free or reduced-price lunches (FRPL) provides a “proxy measure for the concentration of low-income students within a school.” NCES defines a high-poverty school as one in which at least 75 percent of students qualify for FRPL. This measure is designed for individual schools, but if we conceptualize the entire enrollment of Bibb County Schools as one student body, its FRPL rate of 77 percent would make it a high-poverty school. Between 1992 and 2009, high-poverty schools consistently and significantly underperformed low-poverty schools (those with 25 percent FRPL or lower), according to the NCES.^{vi} But while Bibb County Schools are certainly not the only high-poverty schools to struggle, the district’s performance still lags that of Augusta-Richmond, which has a 74 percent FRPL rate, one percentage point shy of the high-poverty threshold. Despite having a similar makeup of low-income students, schools in Augusta-Richmond have better graduation rates, lower dropout rates, and higher average ACT scores.

FIGURE 6 – SELECTED SCHOOL DISTRICT DATA, 2010-12

	Graduation Rate, 2011-12	9-12 Dropout Rate, 2010-11	% Free and Reduced Lunch, 2010-11	Avg. ACT Score, 2010-11
Macon-Bibb	52.3	5.4	77	17.3
Augusta-Richmond	59.2	1.6	74	17.6
Columbus-Muscogee	67.5	2.1	62	19.0
Georgia	69.7	2.7	57	20.6

Source: Georgia Department of Education

FIGURE 7 – GEORGIA STATE TEST DATA

CRCT-8, Percent Meeting or Exceeding Standards; GHS GT, Percent Pass or Pass Plus

	CRCT-8 Scores, 2010-11					GHS GT Scores, 2010-11				
	Reading	ELA	Math	Social Studies	Science	Reading	ELA	Math	Social Studies	Science
Macon-Bibb	94	85	75	52	40	94	85	75	52	40
Augusta-Richmond	95	88	71	51	46	95	88	71	51	46
Columbus-Muscogee	97	90	82	63	52	97	90	82	63	52
Georgia	97	93	86	73	67	97	93	86	73	67

Source: Georgia Department of Education

Input participants said many of the above problems – along with concerns such as violence in schools and a lack of parental involvement – have generational, socioeconomic roots. Some educators and administrators noted constant struggles to get parents more engaged, not only in the classroom, but more importantly, with students at home. But many also understood that such efforts were more difficult than traditional attempts to bring parents into the classroom and other school functions. Rather, parental engagement was viewed as a multi-step process that required a tremendous investment in social services and adult education. Residents and educators frequently acknowledged that the challenges facing the school system were intrinsically tied to widespread and often generational poverty in many of Macon-Bibb's neighborhoods. Perhaps above all else, input participants viewed the higher education system as a tremendous resource for neighborhood revitalization and adult education (and re-education) efforts that were key components of any comprehensive school improvement initiative.

Parents also noted that there are many bright spots within the system that are easy to miss when looking at the district as a whole. Specific strengths that drew praise included the International Baccalaureate program in high schools and the quality of some elementary schools. However, participants also lamented a lack of a quality middle school "link" connecting these praise-worthy elementary and high school programs. One individual who attended Bibb County Schools for his entire K-12 education said that half of his class left for private school before sixth grade to avoid going to public middle school.

Despite the high costs of private school and the negative impacts associated with underperforming public schools, input participants described this two-tiered system as "entrenched," particularly the private schools that have been part of the community for decades. Participants described a "private school heritage" wherein many families have deep, long-standing loyalty to private schools. "It's a generational issue," one participant said. "Private school has become an accepted thing because it's always been done that way." Another participant was skeptical of whether the system could ever be fully changed, saying: "People will never pull their kids out of private schools. Accept the fact that you've got a good private system and turn your attention to improving public schools." Others expressed a desire for a more unified public school system that is attractive to all families, though they acknowledged that achieving such a goal would be extremely difficult.

Public Education: the Impact on Workforce Sustainability and Fiscal Sustainability

While Macon-Bibb residents – from parents to educators to elected officials – clearly recognize the impact of a quality school system on individual lives, taken together, a larger story is revealed: **the public school system produces a significant portion of Macon-Bibb's future workforce, and the poor performance of these schools poses serious short- and long-term challenges to the local talent pipeline.** According to employers who participated in the public input process, Bibb County Schools are "disconnected" from local workforce needs. Participants with direct knowledge of hiring decisions said that students from public schools were not prepared for the workforce, often lacked basic communication and social skills, and "are sometimes downright rude." Many entry-level applicants also lacked basic reading and arithmetic skills. One participant noted that most of these individuals respond well to on-the-job training, but that this training comes at a cost to the company. This input is consistent with survey responses that raise concerns about the overall quality of Macon-Bibb's workforce. Among managers, executives, and business owners who responded to the survey, 51 percent rated the quality of the regional workforce as a "disadvantage" or

“major disadvantage” compared to just 17 percent who felt it was an “advantage” or “major advantage.” Roughly half of surveyed employers disagreed or strongly disagreed with the statement, “I have no trouble finding quality employees for my business.”

But the impact of the K-12 education system on Macon-Bibb’s economy stretches far beyond these direct workforce concerns. **The quality of local public schools are an increasingly important consideration in the site selection process for a diverse array of business sectors, meaning Macon-Bibb will be at a competitive disadvantage to attract new businesses to the community.** Input participants stated that the public school system was detrimental to economic development efforts. Said one, “If you don’t fix this, how can you succeed?” According to multiple stakeholders and employers that participated in focus groups, interviews, and the online survey, poor schools have inhibited efforts by established Macon-Bibb firms to recruit new talent to the area. According to one participant, “rank-and-file” employees cannot afford private schools, and thus cannot choose to live in an area without quality public schools. But this problem is not limited to lower-paid employees. One firm has engaged in several unsuccessful recruitments of engineers, who said they would not move to the area because of its school system. According to one input participant, the K-12 education system in Macon-Bibb is particularly daunting to outsiders. People who are from the area know how to “negotiate the strategy” for getting their children a good education, whether that means moving into the right neighborhood within Macon-Bibb county or budgeting for private school. Outsiders, however, do not have this knowledge, and are instead scared away due to the overall quality of the system.

Research has consistently shown that school quality is tied to property values, with numerous studies finding that school quality has a “direct and positive influence” on residential property taxes. Simply put, with all other factors held constant, homes in high-performing school districts sell for higher prices than homes in low-performing school districts. This is true even if the taxes are higher in the jurisdiction with good schools.^{vii} Accordingly, poor schools depress property values, which in turn negatively impacts property tax revenues – the largest revenue in Bibb County and the second-largest revenue source in the City of Macon in FY 2012. Quite clearly, the issue of school quality is fundamentally linked to the issues of workforce and fiscal sustainability that were highlighted in previous sections of this Competitive Assessment. The following section will examine the role of higher education in developing the future workforce.

HIGHER EDUCATION: IMMENSE PRODUCTION, LIMITED RETENTION

Whereas the K-12 education system represents a serious threat to the sustainability of Macon-Bibb’s talent pipeline, **the community’s institutions of higher education have become a major positive force.** Macon-Bibb has an impressive mix of post-secondary education options – both public and private. This list of assets includes but is not limited to:

- A technical college (Central Georgia Technical College)
- A public, baccalaureate-granting institution (Middle Georgia State College)
- A private, four-year liberal arts college (Wesleyan College)
- A private, four-year university (Mercer University) that also contains:

- An school of engineering
 - A school of law
 - A school of medicine
- A branch of a public school (Georgia College and State University) offering graduate programs in business, education, and nursing, among others

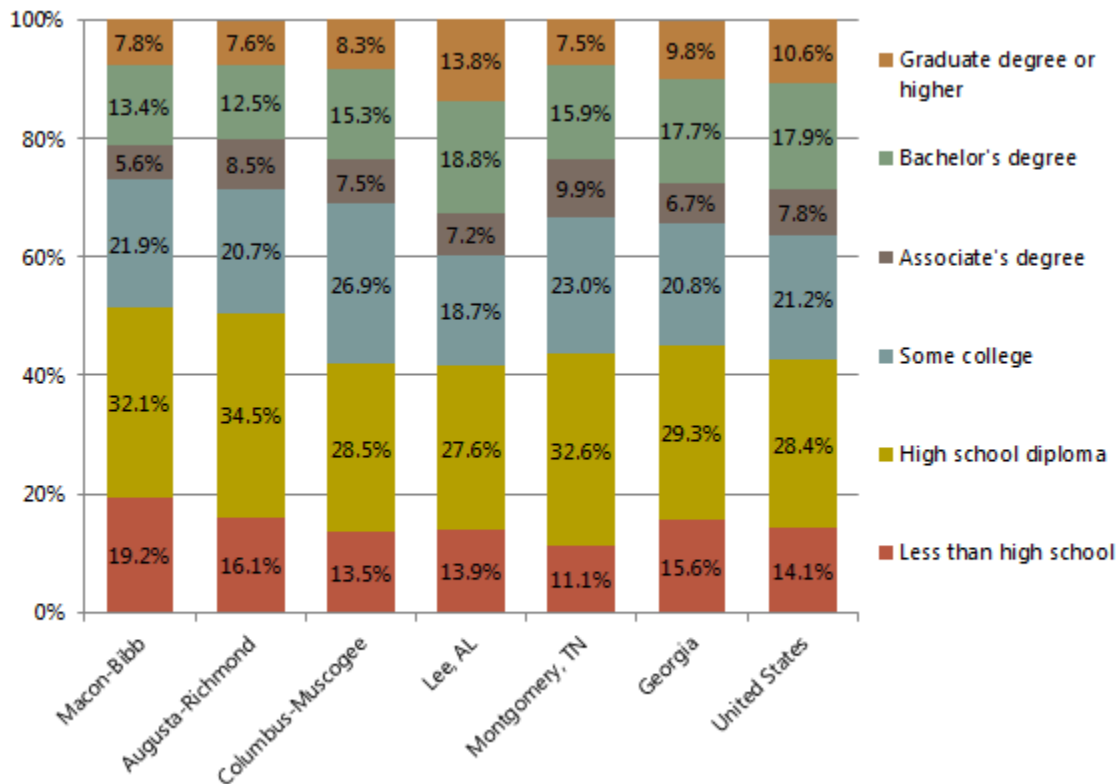
For a community of Macon's size, this is an impressive – and rare – collection of assets. None of the four comparison counties come close to matching the breadth of higher education opportunities in Macon-Bibb. In total, 20,699 students were enrolled in Macon-Bibb's higher education students in the fall of 2011. Only Lee County, AL had more total students, 25,469, all of whom were enrolled in Auburn University. According to the National Center for Education statistics, 6,127 students were enrolled at CGTC, 8,194 at Mercer University, 5,702 at Middle Georgia State College, and 676 at Wesleyan College. These four schools combined to produce 5,455 degree completions in 2011. These included: 1,944 certificates below the baccalaureate level, 610 associate's degrees, 1,740 bachelor's degrees, 737 master's degrees, 381 doctor's degrees, and 43 certificates above the baccalaureate level. Only Augusta-Richmond produced degree completions in each of the six aforementioned categories, and its schools accounted for 3,590 total completions, less than two-thirds of the number of completions as those in Macon-Bibb.

In public input sessions, the area's higher education institutions generally drew high praise. A majority of survey respondents rated each of the four non-profit institutions based in Macon-Bibb – public schools CGTC and MGSC and private schools Mercer and Wesleyan – as "above average" or "excellent." Large majorities of respondents also found the availability and affordability of local higher education programs to be an "advantage" or "major advantage." One input participant mentioned the smooth merger between Macon State College and Middle Georgia College as an underappreciated development. Employers also cited several examples of positive collaborations between institutions of higher education and the business community. Revitalization efforts around Mercer University (particularly College Hill), and the collaboration between Mercer, the *Telegraph*, and Georgia Public Broadcasting to create The Center for Collaborative Journalism drew praise. Many respondents expressed optimism that successful efforts catalyzed by university investment, student involvement, and neighborhood engagement would take root in other areas surrounding the community's various campuses. A representative from one large firm also noted great success in working with CGTC to develop a specialized training program to educate workers for previously hard-to-fill positions. "It's a competitive, advantage," the participant said. "They will build the program you want."

But while Macon-Bibb's higher educational assets are strong, they have not translated into a more educated populace. This underscores the challenge that Macon-Bibb has faced in not only *attracting* but also *retaining* young talent. Between 2001 and 2011, educational attainment in Macon-Bibb was stagnant, with the percentage of adult residents age 25 and over with a bachelor's degree or higher falling slightly from 21.3 percent to 21.2 percent. During this same time period, the proportion of the United States' population with a bachelor's degree increased by 4.1 percentage points. Meanwhile, just 5.6 percent of the adult population possesses an Associate's degree, considerably lower than all comparisons. In total, the percentage of Macon-Bibb residents with at least some college education is lower than any other comparison geography. At the other end of the spectrum, nearly one in five adult residents (19.2 percent)

does not have a high school diploma. Within the five-county metro area that more closely approximates Macon-Bibb's labor shed, just 20.2 percent of adults have a bachelor's degree or higher. **The relative lack of college-educated residents significantly inhibits the community's ability to attract new jobs in sectors that rely on an abundant supply of knowledge workers. This includes but is not limited to information technology, corporate headquarters, and professional services (accounting, legal services, marketing and public relations, engineering services, etc.).**

FIGURE 8 – EDUCATIONAL ATTAINMENT, 2011



Source: U.S. Census Bureau American Community Survey; Moody's

Though it is impossible to know for certain, it is likely that the stagnant growth at the highest levels of educational attainment has been influenced by the out-migration trends described earlier in this assessment. But this brings up an important, larger point – Macon-Bibb's institutions of higher education are only "assets" to the extent that the graduates they produce remain in the community. **On this front, many input participants agreed that the higher education community and Macon-Bibb's public and private leadership could do more collaboratively to engage students and keep recent graduates in the area. Participants noted that in some fields, such as law, many graduates remain in Macon-Bibb. Additionally, 64.7 percent of Mercer medical school graduates remain in Georgia, more than 10 percentage points higher than any of the other three accredited medical schools in the state, according to Med School Mapper, part of the Macy Foundation's HealthLandscape program. But in other fields, input participants cited a lack of employment opportunities and connections to keep recent graduates in Macon-Bibb. Just**

29.1 percent of survey participants said they felt that there would be career opportunities available to their child (or themselves) upon graduation from high school, college, or university, or upon completion of military service. Input participants emphasized that it is particularly challenging to retain those students who did not grow up in the immediate area. Said one participant, "Most of Middle Georgia State College students stay here because they are from here and they know the community. Can we get other students to reach a similar level of connection?" One participant praised Mercer's efforts to engage students and alumni and welcome newcomers, but suggested the program could be expanded to a larger scale. Fortunately, the assets are there – the mission must be to activate them in a way that will engage students and keep alumni in Macon-Bibb to the benefit of the area's workforce.

INCOME AND POVERTY

Officially, Macon-Bibb's per capita income increased by 23.5 percent between 2001 and 2011, rising from \$28,880 to \$35,676. Despite this positive growth, the community is actually losing ground for several reasons. The first is inflation, as measured by the frequently-cited Consumer Price Index. Between 2001 and 2011, the CPI for mid-size Southern cities increased by 27.1 percent, the same as the national average for the time period. So while wages increased, the purchasing power of Macon-Bibb's citizens actually decreased. In other words, there was no real income growth during this period – there was actually real income *loss*.

FIGURE 9 – PER CAPITA INCOME, 2001-2011

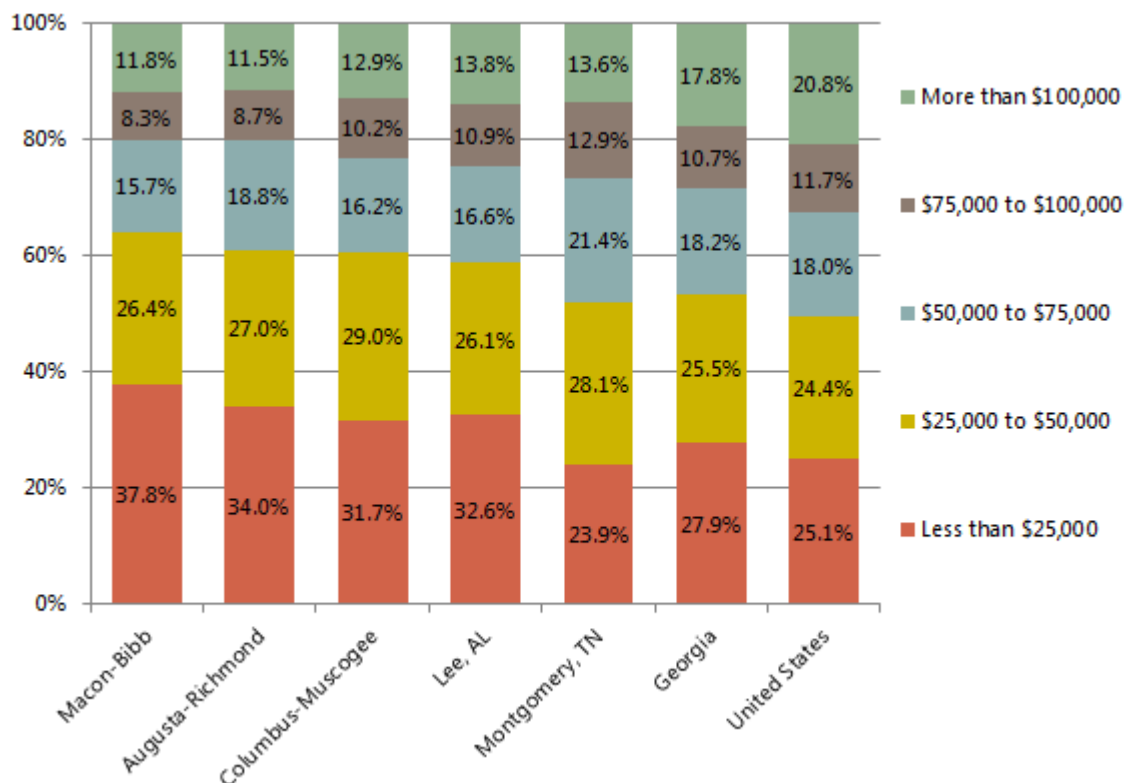


Source: U.S. Bureau of Economic Analysis; Moody's

Macon-Bibb also lost ground to its competitors during this time period. Between 2001 and 2011, each of the four comparison counties saw per capita incomes rise by 30.3 percent, a larger increase than the national rise in CPI for this time period. In 2001, Macon-Bibb had the highest per capita income among the five counties examined in this report. By 2011, it had lost ground to each and been surpassed by Columbus-Muscogee and Montgomery, TN. Macon-Bibb did close the PCI gap with the statewide average between 2001 and 2011, and now trails the state average by just \$303. But it also lost ground to the United States average during this time period – with the gap widening from \$2,277 in 2001 to \$5,884 in 2011.

In more recent times, Macon-Bibb's per capita income (the average individual income) rose by 7.2 percent between 2006 and 2011. But during this same time period, the County's median household income (the midpoint in household income) actually *decreased* by 7.1 percent (-\$2,581). This discrepancy can be explained by growth at the two ends of the income spectrum, with a simultaneous "hollowing out" of the middle class. During this time period, households earning less than \$25,000 increased slightly as a percentage of the total population, rising 0.2 percentage points from 37.6 percent to 37.8 percent. Though this increase was small, it stands in contrast to national picture, where the proportion of households in this income bracket decreased by 3.5 percent. At the other end of the spectrum, Macon-Bibb households earning more than \$100,000 per year increased by 3.0 percentage points – from 8.8 percent in 2006 to 11.8 percent in 2011.

FIGURE 10 – MEDIAN HOUSEHOLD INCOME DISTRIBUTION, 2011

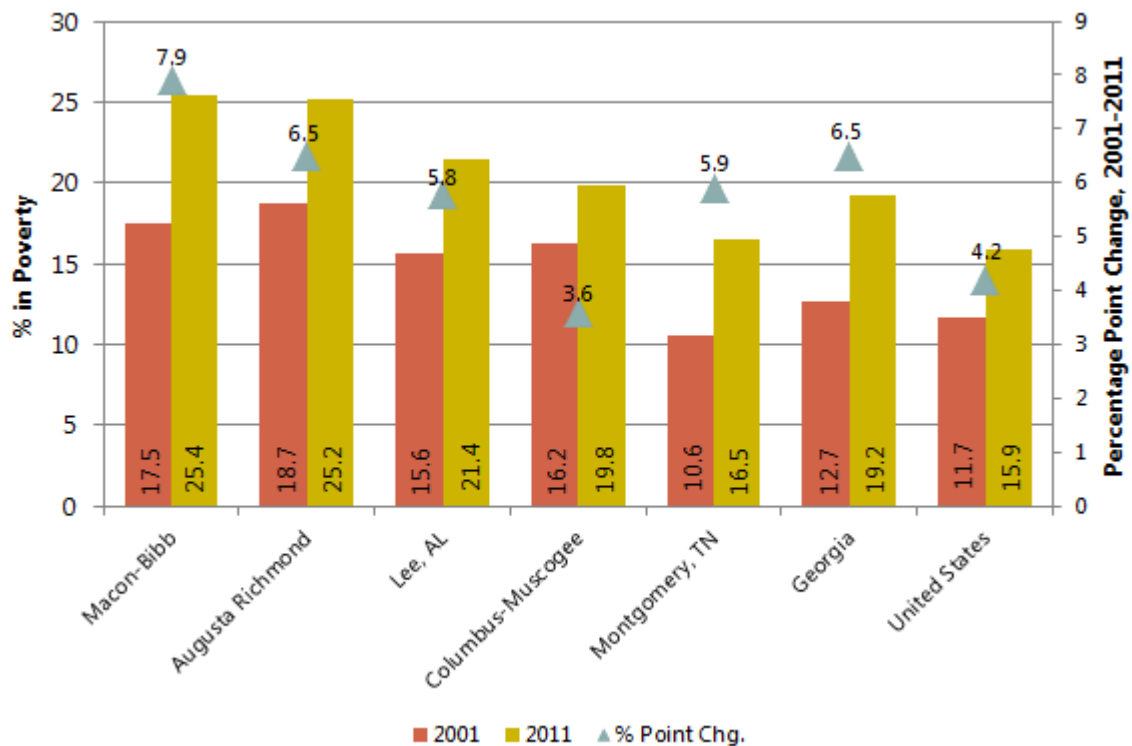


Source: U.S. Census Bureau American Community Survey; Moody's

Going back further and comparing median household incomes in 1999 to those in 2011, it also becomes clear that Macon-Bibb's middle class is shrinking. The percentage of households earning between \$35,000 and \$74,999 decreased during this time period, from 32.2 percent to 28.9 percent – a total loss of 2,865 households. This was not a case of middle-income households simply moving up or down the ladder. The net increase of all of the other income brackets that grew during this time period was 1,923 households, while in total Macon-Bibb lost 2,987 households. Simply put, the decrease in the middle-income ranges was almost certainly influenced by households leaving the county.

Unfortunately, it is fair to say that, as a whole, Macon-Bibb's residents are now less prosperous than they were at the turn of the century. There is a particularly large group of people at the bottom of the ladder. In 2011, 37.8 percent of Macon-Bibb households earned less than \$25,000 per year. This group is 9.9 percentage points larger than the state level of 27.9, 12.7 percentage points higher than the national figure of 25.1 percent, and 3.8 percentage points higher than the next closest comparison county, Augusta-Richmond. In 2011, the most recent year for which poverty rates are available, the federal poverty threshold for a family of four with two children was \$22,811. The national average income for high school dropouts is \$18,794. Based on these data points, it is clear that a single-income earning household headed by a high school dropout is likely on a path to poverty in this country. Macon-Bibb has a high percentage of individuals without a high school diploma, and its public school system has a low graduation rate and stubbornly high dropout rates. It is therefore not surprising that poverty is pervasive in Macon-Bibb.

FIGURE 11 – PERCENTAGE OF ALL AGES IN POVERTY, 2001-2011



Source: U.S. Census Bureau Small Area Income and Poverty Estimates

In 2011, Macon-Bibb's poverty rate was 25.4 percent, according to the Small Area Income and Poverty Estimates program of the U.S. Census Bureau. This rate represents a 7.9 percentage point increase over that which was observed in 2001. Both the rate itself and the increase were the highest of any comparison geography. Georgia's poverty rate is 6.2 percentage points lower, while the level of poverty in the United States is 9.5 percentage points lower. Only Augusta-Richmond (25.2 percent) and Lee, AL (21.4 percent) have rates within five percentage points of Macon-Bibb. Augusta-Richmond and the state of Georgia had the next-largest increase in their poverty levels between 2001 and 2011 at 6.5 percentage points. **Macon-Bibb's poverty level is in the 11th percentile among all counties nationwide, meaning that 89 percent of U.S. counties have a lower poverty rate.**

For children (ages 0-17), the situation is even worse. Macon-Bibb's child poverty rate is alarmingly high at 35 percent. This represents an 8.0 percentage point increase over 2001. Only Augusta-Richmond (35.8) has a higher child poverty rate. *During the input process, one participant lamented that most people in Macon-Bibb do not talk about how pervasive child poverty is, saying, "They get too uncomfortable and it's overwhelming." According to members of Macon-Bibb's faith-based community, many children attend after-school programs simply to eat because there is no food at home. Many children in Macon-Bibb are subsisting solely on subsidized school lunches and whatever is provided by these programs.*

After-school programs are just one element of a "safety net" that provides for many of Macon-Bibb's citizens. *The New York Times* analyzed the share of Americans' income that comes from the government safety net and included the findings on an interactive map titled, "The Geography of Government Benefits." *The Times* analyzed Bureau of Economic Analysis data on the national and county levels to determine what proportion of a locality's income comes from benefits such as Medicare, Social Security, and food stamps. In 2009, the most recent year the paper analyzed, 24.2 percent of all income in Macon-Bibb was derived from government benefits. This figure is 6.6 percentage points higher than the share of national income supported by the government. On a per capita basis, these benefits come out to \$8,763, with Social Security (\$2,309), Medicare (\$2,362), Medicaid (\$1,406) accounting for the majority of this total. Income Support, which includes things such as food stamps and disability payments, accounts for \$1,343 per capita. Between 1999 and 2009, the share of Macon-Bibb's income derived from benefits increased by 7.9 percentage points, 2.9 percentage points faster than the national rate of growth.

According to input participants, the challenges of poverty and economic stagnation run deep. Said one participant, "We have generations of under-educated families. It's hard to break that cycle." Some participants said this cycle is self-reinforcing due to a pervasive attitude of negativity and despair, often coupled with low expectations for educational attainment. Input participants did note some positive developments in the effort to combat generational poverty. As previously mentioned, many felt that efforts to re-educate adults in neighborhoods with poor performing schools were equally as important as more targeted "parenting programs." Other participants identified Macon Promise Neighborhood as a particularly successful program. The initiative operates in the Unionville and Tindall Heights neighborhoods and is aimed at improving children's achievement in school and ending generational poverty by providing young people and their parents with opportunities typically available only in wealthier neighborhoods. But overall, input participants indicated that these efforts have been too few in number and have sometimes not been as successful as originally intended.

RECESSION AND RECOVERY

Economic development is a multi-faceted exercise that involves a variety of entities working as a team on varied projects and exercises. But underpinning all of these activities is a single goal that is the central tenet of holistic economic development: enhancing the opportunity for all individuals to create wealth. In addition to investment in education, the primary means by which wealth creation is achieved is via the creation of jobs – either through relocations, expansions, or entrepreneurship. But anytime the economy falters and jobs begin to dry up, the opportunity to create wealth diminishes. Accordingly, the Great Recession and the subsequent slow recovery has affected or exacerbated many of the aforementioned struggles that families in Macon-Bibb are experiencing.

As we have seen in previous sections, Macon-Bibb is plagued by widespread and rising poverty, with the most recent decade characterized by real income loss for the average Macon-Bibb resident. While the Great Recession certainly had a profound impact, Macon-Bibb's economic health was already faltering at the start of the recession in late 2007. Between September 2000 and September 2007, the total number of jobs expanded by 3.9 percent in both Georgia and the United States. But during this same time period, Macon-Bibb's employment base contracted by 5.5 percent. As a result, just a few months prior to the official start of the recession (which began in December 2007), 83,401 jobs were based in Macon-Bibb – 4,826 fewer than there had been seven years earlier. Augusta-Richmond experienced a similar decline, losing 5.4 percent of its jobs, while Columbus-Muscogee also declined to a lesser extent (1.3 percent). At the same time, Lee, AL and Montgomery, TN were experiencing rapid growth, expanding by 19.9 and 14.0 percent, respectively.

FIGURE 12 – JOB GROWTH, 2000-2012

	Total Jobs (September)				Raw Change			% Change		
	2000	2007	2009	2012	00-07	07-09	09-12	00-07	07-09	09-12
Macon-Bibb	88,227	83,401	79,898	80,276	-4,826	-3,503	378	-5.5%	-4.2%	0.5%
Augusta-Richmond	107,507	101,687	97,281	98,300	-5,820	-4,406	1,019	-5.4%	-4.3%	1.0%
Columbus-Muscogee	98,185	96,891	91,051	93,652	-1,294	-5,840	2,601	-1.3%	-6.0%	2.9%
Lee, AL	42,529	51,008	47,360	51,021	8,479	-3,648	3,661	19.9%	-7.2%	7.7%
Montgomery, TN	39,434	44,945	42,912	46,376	5,511	-2,033	3,464	14.0%	-4.5%	8.1%
Georgia (Ths.)	3,933	4,085	3,752	3,841	152	-333	89	3.9%	-8.2%	2.4%
United States (Ths.)	131,138	136,230	128,130	132,625	5,092	-8,100	4,495	3.9%	-5.9%	3.5%

Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages; Moody's

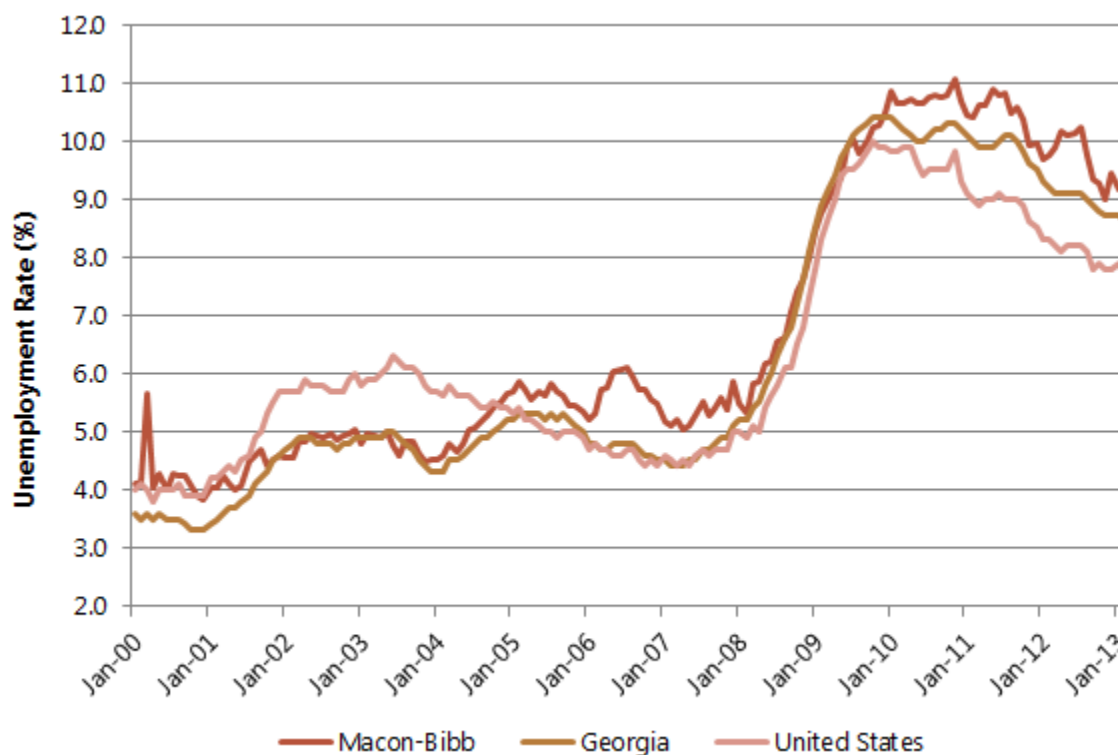
Like the rest of the country, Macon-Bibb's economy was battered during the Great Recession. **Between September 2007 and September 2009, the county lost 3,503 jobs, a decrease of 4.2 percent. As a percentage, this decline was actually the smallest of any comparison geography – well below the national decline of 5.9 percent and almost half as small as the 8.2 percent rate of decline in Georgia. But while the state and nation had been growing rapidly in the run-up to December 2007, Macon-Bibb began the Great Recession from a position of relative weakness.**

The Great Recession officially ended in June 2009, and again like many communities, Macon-Bibb has experienced a sluggish recovery since that time. Between September 2009 and September 2012, the

number of jobs based in Macon-Bibb grew by just 0.5 percent, an increase that lags every comparison geography. In Georgia, the number of jobs increased by 2.4 percent, while in the United States the increase was 3.5 percent. Augusta-Richmond (1.0) and Columbus-Muscogee (2.9) also out-performed Macon-Bibb, while the biggest gains came in Lee, AL (7.7) and Montgomery, TN (8.1). By September 2012, there were 80,726 jobs in Macon-Bibb, 7,951 fewer than there were in September 2000.

Unsurprisingly, Macon-Bibb's unemployment rate has remained a bit higher than the statewide and national averages as the community's recovery has lagged behind. In the United States, the non-seasonally adjusted unemployment rate peaked in October 2009, reaching double digits for the first time in the new millennium. During that same month, Macon-Bibb's unemployment rate was 10.2 percent. But while the national figure began a slow but steady decline the next month, Macon-Bibb was at the beginning of a run of 25 consecutive months of double-digit unemployment, which lasted from October 2009 to October 2011. At the end of this streak, the unemployment rate in Macon-Bibb was 10.4 percent compared to just 8.9 percent nationally. In February 2013, the most recent month examined, Macon-Bibb's unemployment rate was 9.15 percent.

FIGURE 13 – UNEMPLOYMENT RATES, 2000-2012

























Source: U.S. Bureau of Labor Statistics Local Area Unemployment Statistics

The Great Recession placed significant stress on particular sectors in Macon-Bibb, as the chart below shows. Between 2007 and 2012, sectors such as construction (963 jobs lost, 32 percent decline), wholesale trade (858 jobs lost, 26 percent decline), and transportation and warehousing (729 jobs lost, 32 percent

decline) were hit particularly hard. The public sector also shrank rapidly, with government shedding 1,066 jobs for a 9 percent decline.^{viii} The job losses in Macon-Bibb's manufacturing sector have not been as pronounced. Between 2007 and 2012, this sector shed just 481 jobs, a decline of eight percent. But the real damage to the manufacturing sector had already been done by this time. From 2001 to 2007, Macon-Bibb lost 4,946 manufacturing jobs. In 2012, the sector had just 5,206 employees – less than half of the 10,940 it had 11 years prior. The decline in these industries is particularly troubling because each of these sectors pay average annual wages that are above the \$46,353 average for all of Macon-Bibb, with the exception of transportation and warehousing which is close behind at \$44,868.

FIGURE 14 – EMPLOYMENT AND WAGES BY BUSINESS SECTOR, 2007-2012

Industry				2012	
	2012 Jobs	Raw Change, 2007-2012	% Change, 2007-2012	Location Quotient	2012 Earnings
Total	81,502	-2,245	-3%	 1.00	\$46,353
Agriculture, Forestry, Fishing and Hunting	128	30	31%	 0.17	\$54,268
Mining, Quarrying, and Oil and Gas Extraction	81	--	--	 0.17	\$82,864
Utilities	215	-101	-32%	 0.62	\$117,591
Construction	2,039	-963	-32%	 0.60	\$49,136
Manufacturing	5,513	-481	-8%	 0.75	\$67,386
Wholesale Trade	2,382	-858	-26%	 0.68	\$53,128
Retail Trade	11,897	912	8%	 1.29	\$28,342
Transportation and Warehousing	1,533	-729	-32%	 0.60	\$44,868
Information	1,582	-211	-12%	 0.96	\$56,610
Finance and Insurance	7,017	742	12%	 2.03	\$55,411
Real Estate and Rental and Leasing	1,163	-78	-6%	 0.97	\$41,744
Professional, Scientific, and Technical Services	2,636	132	5%	 0.54	\$61,519
Management of Companies and Enterprises	2,059	244	13%	 1.70	\$65,679
Admin and Support and Waste Mgmt and Remediation Svcs	4,929	-1,071	-18%	 1.00	\$29,088
Educational Services (Private)	2,304	79	4%	 1.43	\$52,814
Health Care and Social Assistance	15,314	741	5%	 1.47	\$58,467
Arts, Entertainment, and Recreation	397	-78	-16%	 0.33	\$23,104
Accommodation and Food Services	7,489	80	1%	 1.03	\$15,857
Other Services (except Public Administration)	2,174	236	12%	 0.79	\$34,923
Government	10,495	-1,066	-9%	 0.80	\$51,555
Unclassified Industry	155	120	343%	 1.26	\$32,538

Source: EMSI; Bureau of Labor Statistics Quarterly Census of Employment and Wages

Many input participants noted a lack of jobs of all types in the wake of the recession, even entry-level positions. But input participants said high-quality jobs seem to be in the shortest supply. Said one participant, "I am neither a lawyer nor an engineer, and those seem to be the only jobs which will pay a head-of-household wage. Unless we can increase wages in the community, I will have to leave." While some participants noted that even individuals with strong educational credentials have trouble, times are particularly hard for individuals without college degrees. This represents a marked change from how things used to be in Macon-Bibb. One participant said, "In the previous decades there were places for people to work that did not (require employees) to do anything but come to work and know the job. Generations of people bought houses, paid for cars, took vacations, and sent children to college with the income from these types of jobs." According to input participants, these types of jobs are scarce today.

Macon-Bibb experienced an equally rapid loss of high-quality jobs just before the recession hit as well. Much of the decline in manufacturing between 2001 and 2007 can be attributed to the departure of Brown & Williamson, which merged with R.J. Reynolds in October 2003 and relocated its operations to Winston-Salem, NC. The impact of this merger on Macon-Bibb was profound. In 2001, the county had 2,573 jobs in the beverage and tobacco product manufacturing subsector. According to the U.S. Census Bureau's Quarterly Workforce Indicators, employees who worked in this sector on the last day of the fourth quarter in 2001 earned an average annual wage of \$62,352. But these jobs were gradually eliminated or relocated – between 2005 and 2008, Macon-Bibb lost a net 620 out-migrants to Forsyth County (Winston-Salem), North Carolina. By 2012, there were fewer than 10 workers in the beverage and tobacco product manufacturing. The impact of the Brown & Williamson relocation on the Macon-Bibb economy highlights the importance of business retention efforts that seek to identify core business challenges early on, and aid local businesses in alleviating those challenges so that they can thrive and prosper in the community for many years to come. Without question, there are circumstances (such as mergers and acquisitions) that are outside a community's control; nonetheless, **the memory of Brown & Williamson's departure led many input participants to ask "What would happen if we lost another major employer like that?"**

Macon-Bibb continues to benefit from the presence of several large employers across a variety of sectors. Health care, which accounts for the biggest piece of the local economy, is led by the Medical Center of Central Georgia and Coliseum Health Systems. Other key private employers include insurers GEICO and the Georgia Farm Bureau Federation, and manufacturers such as YKK, Graphic Packaging International, and Boeing, among many others. **The business sectors containing these major employers proved resilient through the recession, with only manufacturing losing employees – and at a rate slower than the national average. Between 2007 and 2012, the finance and insurance sector actually expanded considerably in Macon-Bibb (12 percent growth, 742 jobs added) followed by retail trade (eight percent growth, 912 jobs added) and health care and social assistance (five percent growth, 741 jobs added).** The growth of retail and health care is particularly impressive. Normally, these sectors tend to follow population – that is, they locate where people are. The fact that they continued to grow despite flat population growth indicates that Macon-Bibb remains a strong regional center capable of attracting health care and retail expenditures from surrounding counties. It may be difficult for this trend to be sustained far into the future, as these sectors will ultimately become more diffused within the region to serve shifting populations.

Across all business sectors, the "decentralization" of employment in the region is already well underway. In September 2002, there were 84,904 jobs in Macon-Bibb. These accounted for 55.9 percent of the 151,858 total jobs in the Macon-Warner Robins-Fort Valley CSA. By September 2012, the number of jobs in Macon-Bibb had decreased to 80,276 while the regional job total had increased to 157,982. Accordingly, Macon-Bibb now has just barely more than half of the region's jobs – 50.8 percent. Macon-Bibb must therefore examine strategies to drive growth across a variety of business sectors – a topic that will be fully explored in the Target Business Analysis phase of this process.

“LOCATION, LOCATION, LOCATION”

Many of Macon-Bibb’s business sectors have struggled in recent years, but the community possesses a strong set of competitive advantages that can be leveraged to reverse these trends. In addition to excellent higher education assets described earlier in this assessment, Macon-Bibb also has a variety of physical, geographic, and infrastructure strengths that could help drive economic growth and raise the community’s level of prosperity. These include but are not limited to:

- **An abundant supply of water that exceeds the community’s current needs.** While communities throughout Georgia and the Southeast face significant concerns related to water resources, the Macon Water Authority oversees a secure, sustainable supply of water emanating from the Javors Lucas Lake water storage reservoir and the Ocmulgee River. These resources are a significant advantage that should make Macon-Bibb a particularly attractive destination for water-intensive businesses.
- **Excellent road and rail connectivity.** Macon-Bibb is served by two primary Interstate Highways – I-16 and I-75 – that provide linkages with Atlanta, Savannah, and points south, including the markets and ports of Florida. The soon-to-be-completed State Route 540, commonly known as the Fall Line Freeway, will also provide a continuous, four-lane divided highway connecting Macon-Bibb with Augusta and Columbus. Macon-Bibb is also served by the Norfolk Southern Class I railroad in addition to short lines that provide rail access to a variety of key destinations, including the Port of Savannah.
- **Proximity to the Port of Savannah.** Macon-Bibb is located approximately 165 miles from the Port of Savannah, a fast growing seaport that is currently working to position itself for even greater success in the Post-Panamax world of shipping. Macon-Bibb has direct rail and freeway links to the port via Norfolk Southern tracks and I-16.
- **Proximity to the Hartsfield-Jackson Atlanta International Airport.** Macon-Bibb is positioned close to the world’s busiest passenger airport, which offers direct flights to 150 destinations in the United States and 75 international destinations in 50 countries. Though Hartsfield-Jackson is approximately 80 miles away via I-75, drive times to and from Macon-Bibb may be competitive with some of Atlanta’s northern suburbs, as travelers must pass through the city’s center to reach these destinations.
- **The presence of Middle Georgia Regional Airport.** Despite a relative lack of scheduled service, Macon-Bibb’s own airport provides an opportunity for direct corporate flights to the community and is a location around which businesses in sectors such as aerospace can locate.
- **The presence of Robins Air Force Base.** The base is a major employer in the Macon-Warner Robins-Fort Valley CSA and is a strong regional attractor of businesses and talent. Its regional impact cannot be overstated.
- **A central location within the state of Georgia.** Macon-Bibb is located roughly in the center of Georgia, with close proximity to markets such as Atlanta, Augusta, Columbus, and Savannah.

FIGURE 15 – SURVEY RESULTS: WHAT IS MACON-BIBB COUNTY'S GREATEST STRENGTH?



Source: Market Street Services

The aforementioned assets represent important competitive advantages that likely appeal to firms engaged in the production and distribution of goods: transportation, warehousing, and logistics; wholesale trade; and manufacturing sectors, particularly those whose production processes are water-intensive such as paper products, food processing, and beverages, among others. Unfortunately, these business sectors do not have high concentrations in Macon-Bibb. A location quotient is a tool used to measure the concentration of a specific business sector relative to the national economy. Specifically, it is a ratio of a sectors share of total local employment to that same sector's share of total national employment. If a business sector has a location quotient greater than one, it is said to be more concentrated in a given area than the United States as a whole. In Macon-Bibb, manufacturing has a location quotient of 0.75, while wholesale trade and transportation and warehousing have location quotients of 0.68 and 0.60, respectively.

There have been some positive recent announcements related to Macon-Bibb County's competitive transportation infrastructure. Notable examples include Tractor Supply Company, which announced a regional distribution center in the I-75 Business Park, and Bass Pro Shops, which opened its first-ever distribution center outside of its home base of Springfield, Missouri in 2005.

But overall, there are no simple explanations for this lack of concentration. One possible explanation is that some of Macon-Bibb's challenges highlighted in previous sections – such as workforce sustainability and public education – are significant enough to offset the community's significant location and infrastructure advantages. If this is the case, no amount of economic development marketing effort or expense could overcome these barriers – these issues must be addressed in a more comprehensive fashion, as is being done in this process.

Given recent contraction in business sectors such as manufacturing and concerns about a reliance on a few major employers, input participants also suggested that there needs to be a greater focus on entrepreneurship. Survey respondents who self-identified as a small business owner, entrepreneur, or sole proprietor had mixed opinions about the small business climate in Macon-Bibb. This group identified small business networking opportunities and the affordability of office, retail, industrial, and lab/research spaces

as advantages. But 52 percent found the availability of venture and/or angel capital to be a “disadvantage” or “major disadvantage,” compared to just 4 percent who called it an “advantage” or “major advantage.” A majority of respondents also saw the ease and speed of the permitting process (51.6 percent) and the responsiveness of local government to small business needs (56.6 percent) as a disadvantage or worse. Said one participant, “Macon’s leaders see economic development as ‘just industrial.’ ” Another noted a community culture that can be complacent with too few risk “risk-takers” and “business-hungry” people. Whatever the source, many agreed that there should be an increased emphasis on supporting small businesses, promoting innovation, and opening up access to capital. Such an emphasis on entrepreneurship could help create more opportunities to Macon-Bibb residents at all income levels and engage student and young professional populations. One participant noted that Mercer University is already exploring ways in which entrepreneurship can be used to aid talent-retention efforts. The University is also integrating student entrepreneurship via formal curriculum and project-based learning in a variety of disciplines. Another significant effort already underway is JumpStart, a partnership between the College Hill Alliance, the Knight Foundation, and JumpStart America to study how “knowledge-based industries” can be promoted in the College Hill neighborhood. This strategic planning process will seek to harmonize objectives and strategic recommendations with the JumpStart process.

HEALTH IN MACON-BIBB: STRONG ASSETS BUT POOR OUTCOMES

Another set of key strengths that warrant special mention are Macon-Bibb’s health care assets. The most visible of these are the community’s two hospital systems – The Medical Center of Central Georgia and Coliseum Health System – and the School of Medicine at Mercer University. MCCG is the state’s second-largest hospital and is the only Level I Trauma Center in the region, and Coliseum maintains two full-service medical-surgical hospitals and one psychiatric facility. Together, they employ more than 5,200 people. Because of these strong entities, Macon-Bibb has a high concentration of physicians. According to Sperling’s Best Places, there are 450.7 physicians per 100,000 residents in Macon-Bibb, well above the national average of 261.3 and trailing only Augusta-Richmond among county-level comparisons. Similar to retail Macon-Bibb is also home to the Mercer University School of Medicine, nursing programs at Mercer, Middle Georgia State College, Georgia College and State University, and Wesleyan College (beginning in Fall 2013) and a practical nursing program at Central Georgia Technical College.

Health care is also a crucial component of the local economy. It is the single-largest business sector in Macon-Bibb, with more than 15,000 employees in 2012 – nearly 19 percent of all jobs in the county. Among major business sectors, health care has the second-highest location quotient in Macon-Bibb at 1.47, revealing that employment in the sector is nearly one-and-a-half times more concentrated in the County than the national average. It is also one of just two business sectors in Macon-Bibb whose average annual wage (\$58,467) exceeds the national average for the sector. And as discussed earlier in this assessment, health care employment grew between 2007 and 2012 despite population growth and out-migration trends that would normally act as a drag on health care demand. This can be attributed predominantly to regional population growth outside of Macon-Bibb as well as an aging population that has supported rapid health care service expansion nationwide.

The Robert Wood Johnson Foundation and the University of Wisconsin Population Health Institute publish *County Health Rankings* which rank the health of nearly every county in the nation relative to other counties within the same state in attempt to understand the factors that influence how healthy residents are and how long they live. While Macon-Bibb performs well in the “Clinical Care” category, which measures access to and quality of healthcare, its overall performance is quite poor. Out of 159 counties in Georgia, Macon-Bibb ranks 139th in “Health Outcomes.” This score is a summary of two other metrics – Mortality and Morbidity. Mortality measures the years of potential life lost before the age of 75, and Macon-Bibb ranks 144th in this category. Morbidity, which refers to how healthy people feel while alive, considers the overall health of individuals including their physical and mental health, and the proportion of babies born with a low birthweight. In this category, Macon-Bibb ranks 101st. Finally, Macon-Bibb ranks 123rd in Social and Economic Factors, which include factors such as educational attainment, child poverty, and violent crime rates. Augusta-Richmond and Columbus-Muscogee also achieved their share of troubling results in many categories. But while rankings cannot be compared across state lines, both Lee, AL and Montgomery, TN performed well in their respective states, ranking 3rd out of 67 and 11th out of 95, respectively.

FIGURE 16 – ROBERT WOOD JOHNSON FOUNDATION COUNTY HEALTH RANKINGS, 2013

County	Macon-Bibb	Augusta-Richmond	Columbus-Muscogee	Lee, AL	Montgomery, TN
Out of (# Ranked Counties)	159	159	159	67	95
Health Outcomes	139	135	113	3	11
Health Factors	77	107	76	3	32
Mortality	144	146	123	2	7
Morbidity	101	81	92	9	19
Health Behaviors	83	142	151	4	83
Clinical Care	13	12	9	10	43
Social & Economic Factors	123	126	68	2	12
Physical Environment	82	133	116	47	87

Source: Robert Wood Johnson Foundation

This data clearly shows that while Macon-Bibb has a strong and high capacity health care delivery system, it has relatively poor health outcomes. The percentage of individuals in Macon-Bibb who are without health insurance does not seem to adequately explain this discrepancy. While the 16.8 percent of Macon-Bibb residents who do not have health insurance is 1.6 percentage points higher than the national average, it is 2.6 percentage points *lower* than the Georgia figure of 19.4 percent. So despite having a relatively higher percentage of insured residents, Macon-Bibb’s mortality ranking is in the bottom 10 percent of all Georgia counties. This indicates that the poor health outcomes in Macon-Bibb are likely influenced by other factors. Recent research published in the academic journal *Health Affairs* suggests that socioeconomics may play an important role.^{ix} The study examined mortality rates among females at the county level between 1992 and 2006. The authors found that medical care, as measured by the number of primary care providers or the percentage of uninsured residents was not a predictor of female mortality. The authors wrote:

“Many people believe that medical care and individual behaviors such as exercise, diet, and smoking are the primary reasons for declines in health. We did find significant associations between mortality rates and some of these factors, such as smoking rates for both sexes. But socioeconomic factors such as the percentage of a county’s population with a college education and the rate of children living in poverty had equally strong or stronger relationships to fluctuations in mortality rates.”^x

A thorough examination into the exact causes of poor health outcomes is beyond the scope of this assessment, but the available evidence suggests that the health of Macon-Bibb’s residents is closely tied to other issues of overall prosperity. Pervasive poverty unquestionably impacts the ability of families to pursue certain healthy lifestyle activities, afford certain types of health care, and provide adequate and nutritious meals on a regular basis.

QUALITY OF LIFE AND COMMUNITY ATTACHMENT

This assessment has previously discussed factors such as race relations, schools, and the openness of the community, all of which influence the quality of life in Macon-Bibb. This section discusses other important quality of life aspects, namely: local amenities, crime, housing, and transportation. In short, while many residents praised the community’s heritage, amenities, cultural offerings, and low cost of living, others highlighted crime and other previously mentioned concerns such as racial discord and a troubled public education system as negative influences on their quality of life. Furthermore, what appeals to one segment of the community (such as retirees or families) may not appeal to other segments (such as young professionals or singles).

Local amenities

During the input process, stakeholders identified a number of amenities that have a positive impact on the local quality of life in Macon-Bibb. These include:

- **An interesting downtown with “great bones.”** Said one input participant, “Macon is not Generica – it has character, which is the first thing that guests notice.” Downtown was praised for its façades and character, loft opportunities, sidewalks, and other features that encourage walkability. While downtown generally drew praise, input participants consistently brought up two issues that they feel is holding the district back: crime (or the perception of crime) and a lack of quality retail options. On the latter point, there was widespread agreement among input participants that downtown Macon needs more “name-brand” retail and more neighborhood retail to provide goods and services to local residents. The most frequently identified need was a grocery store. Many acknowledged that such new retail offerings would hopefully follow a recent trend of residential repopulation, particularly loft-living. Just 14.2 percent of survey respondents said they visited downtown for shopping and services. The most commonly cited reasons for visiting downtown Macon were dining options (65.4 percent), special events (64.3), cultural amenities (51.0), and work (41.6). About one fifth of respondents – 21.1 percent – said they lived in or close to downtown.
- **Vibrant neighborhoods:** Input participants also gave high marks to the revitalization efforts underway in the College Hill area, while other participants identified Ingleside Village and North Macon as communities that are attractive to young families due to their walkability and proximity to shopping, respectively. But as previously mentioned, input participants also emphasized the need for more

intensive revitalization efforts in many other troubled neighborhoods plagued by blight, abandonment, and crime throughout the community.

- **Low cost of living:** More than half of survey respondents (51.8 percent) described Macon-Bibb's cost of living as "better than average" or "excellent." Just 5.5 percent found it to be "worse than average" or "poor."
- **Arts and film:** Stakeholders generally praised the quality of the local arts community. Among survey respondents, 75.1 percent rated Macon-Bibb's cultural and arts facilities and programs as "average" or better. Others noted the excitement generated by several high-profile film productions that have occurred in Macon-Bibb. Several participants suggested that the local buzz these films have generated could be leveraged along with established events like the Macon Film Festival to make the area more of a focal point for film in Georgia.
- **Festivals and cultural amenities:** Input participants lauded various cultural offerings and festivals in Macon-Bibb, including Bragg Jam and the College Hill Alliance's Second Sunday Concerts. Many participants also praised the International Cherry Blossom Festival as a family-friendly event that attracts visitors from around the region. But others felt that Cherry Blossom should be changed and opened up to an even wider audience, both demographically and geographically.
- **Musical heritage:** Macon-Bibb's rich musical heritage – and its associated acts such as the Allman Brothers Band, Otis Redding, Little Richard, Chuck Leavell, and Jason Aldean – were widely viewed as an asset by input participants. Macon-Bibb lost an asset in this area in 2011, however, when the Georgia Music Hall of Fame was closed by the state authority that oversaw the downtown Macon museum.
- **Family-friendly activities:** Stakeholders from Macon-Bibb's tourism community identified a strong list of family friendly activities, including museums and parks that serve local residents and can attract visitors. Numerous input participants also expressed excitement over the re-launch of the Mercer University football program into NCAA Division I FCS scheduled for the 2013 season.
- **Natural beauty:** In addition to Macon-Bibb's own natural features such as the Ocmulgee River and Lake Tobesofkee, the community is also within a day's drive of other natural amenities such as beaches and mountains. However, multiple survey respondents indicated that they would like to see a "cleaner" Macon-Bibb ten years from now.
- **Small-town feel with access to big city amenities:** Many input participants praised what they described as a "small town feel" with the ability to get to a major metropolitan area – Atlanta – in a short time.

Crime

In most focus groups conducted during the public input phase, there was consensus that crime was among Macon-Bibb's biggest quality of life challenges. Nearly half of survey respondents – 48.2 percent – said the "sense of personal and property safety" in Macon-Bibb was "worse than average" or "poor." Many participants, however, suggested that the problem was merely a perception, and that the community does not truly have high crime rates. Some participants said they believed that branding certain areas as having a "crime problem" was sometimes a way of using "coded racial language" to identify an area as predominantly black. Numerous participants also lamented what they viewed as media coverage that inadvertently promotes Macon-Bibb's image as a high-crime area by focusing on bad news. One

stakeholder expressed frustration about a specific day where a fight involving only a handful of high school students overshadowed a cultural field trip in which hundreds of local schoolchildren took part.

While there are varying opinions among residents on the issue, the data support the assertion that Macon-Bibb does, in fact, have a relatively high crime rate. In 2010, the most recent year for which data is available from the FBI, Macon-Bibb had 61 violent crimes per 10,000 residents – much higher than the rate observed in Georgia (43.8) or the United States (42.3). This number was also the highest among all comparison communities. On a positive note, the incidence of violent crime declined in Macon-Bibb between 2005 and 2010, falling by 9.9 percent, roughly equivalent to the national rate of decline (10.0 percent). At the same time, violent crime in Augusta-Richmond and Columbus-Muscogee rose. The decline in property crimes in Macon-Bibb was even more pronounced. In 2005, Macon-Bibb had the highest property crime rate of any comparison geography, but this figure has since fallen by 18.8 percent, and Macon-Bibb now has less property crimes per 10,000 residents (653.4) than Augusta-Richmond or Columbus-Muscogee. But despite this progress, Macon-Bibb's property crime rate is still more than double the national average of 308.4, and is also much higher than the state average of 396.0. While crime rates remain elevated relative to state and national averages, recent reductions in violent crime and property crime are a notable bright spot for the community as it demonstrates an ability to effectively address one of its greatest challenges.

FIGURE 18 – CRIME RATES, 2005-2010

	Violent Crime			Property Crime		
	2005	2010	% Change	2005	2010	% Change
Macon-Bibb	67.7	61.0	-9.9%	804.7	653.5	-18.8%
Augusta-Richmond	52.4	57.9	10.5%	734.0	749.1	2.1%
Columbus-Muscogee	53.3	54.0	1.3%	707.3	725.7	2.6%
Lee, AL	37.7	20.6	-45.3%	409.5	279.2	-31.8%
Montgomery, TN	66.5	59.2	-10.9%	314.3	329.6	4.9%
Georgia	45.6	43.8	-4.1%	424.1	396.0	-6.6%
United States	47.1	42.3	-10.0%	344.0	308.4	-10.4%

Source: Federal Bureau of Investigation Uniform Crime Reporting; Moody's

Housing

During the input process, various stakeholders identified Macon-Bibb's variety of attractive, affordable housing options as one of the community's strength. For owner-occupied homes, the data generally supports this sentiment. In the fourth quarter of 2012, the median sales price for an existing single-family home was \$90,830, lower than any comparison geography except for Augusta-Richmond, according to data from the National Association of Realtors and Moody's. From the first quarter of 2000 to the fourth quarter of 2012 – a time period that encompasses the national housing bubble and subsequent burst – the median existing single-family home price in Bibb County declined by 1.5 percent. Meanwhile, median prices appreciated across all four comparison communities (between 8.8 percent and 23.5 percent), while appreciating by more than 32 percent nationwide. While the lack of appreciation has maintained

affordability – an attractive element of the community to young professionals – it has contributed to the suppression of wealth creation via home equity.

The relative affordability of housing and home ownership is frequently measured by dividing the median sales price of existing housing units by the median household income within a given geography. According to this ratio, homes in Macon-Bibb are indeed more affordable than those in Columbus-Muscogee, Lee, AL, and the United States as a whole. They are less affordable, however, than in Augusta-Richmond, Montgomery, TN, and the state of Georgia. According to RealtyTrac, Macon-Bibb had 15 foreclosures for every 10,000 homes as of April 11, 2013 – higher than that of the next-closest comparison county (Montgomery, TN) and the national average, both of which stood at 12. This rate was slightly lower than Georgia's figure of 16, however.

For renters, however, the picture looks much different. In 2011, nearly two thirds (66 percent) of all rental households in Macon-Bibb spent at least 30 percent of their monthly income on rent. That figure is the highest of any comparison geography and is more than 10 percentage points of above the national (55) and state (53) averages. The number of rental households above the 30 percent threshold also increased 62 percent between 2000 and 2011, which was also the highest of any comparison geography. So while owner-occupied homes remain affordable relative to Macon-Bibb's median income, rental units are stretching the budget of many local families – another example of the social stratification that exists within the community.

Transportation

Input participants also highlighted the relative ease of getting around the Macon-Bibb community as a positive influence on the quality of life. A majority – 62.5 percent – of survey respondents rated the community's commute times and traffic flow as "better than average" or "excellent." According to data from the U.S. Census Bureau's American Community Survey that measures commuting times, 81.3 percent of Macon-Bibb residents have a commute of 29 minutes or less. This is consistent with Georgia comparisons Augusta-Richmond (80.6 percent), and Columbus-Muscogee (82.2) and is much lower than state (60.0) and national (65.1) figures. Commuting times in Macon-Bibb remained short despite the fact that 42 percent of Macon-Bibb residents with a job commuted outside of the county for work (which is common in metropolitan labor sheds across the country). As of 2010, 29,537 people lived and worked in Macon-Bibb, according to the Census Bureau, while 21,412 Macon-Bibb residents traveled to another county for work. (An additional 42,000 commuted into Macon-Bibb from another county.)

Variance in opinions by age

Quite clearly, the definition of "quality of life" for a recent college graduate differs greatly from that of a married professional with children, and that of a recent retiree. The following table displays the average rating for three age cohorts with respect to a variety of quality of life factors. The rating scale spans from 0 (poor) to 4 (excellent), resulting in average values that can be interpreted similar to a grade point average (GPA). The data illustrate that young professionals aged 25-44 evaluate the community's cost of living and commute times more favorably than their older counterparts. However, they evaluate the community's appearance, safety, housing stock, and shopping/dining opportunities less favorably.

FIGURE 17 – SURVEY RESPONSES: AVERAGE RATINGS OF SELECTED QUALITY OF LIFE ASPECTS

RATING SCALE: 0 = POOR, 1 = BELOW AVERAGE, 2 = AVERAGE, 3 = GOOD, 4 = EXCELLENT

Quality of Life Aspect	Age Group		
	25-44	45-64	65 or older
Cost of living	3.71	3.52	3.46
Appearance of Macon-Bibb County as a whole	2.52	2.69	2.84
Sense of personal and property safety	2.38	2.58	2.65
High-quality housing stock	2.98	3.24	3.21
Commuting time/traffic flow	3.78	3.75	3.52
Shopping and dining opportunities	3.01	3.31	3.54

Source: Market Street Services

When asked to identify what Macon-Bibb needs to do better to attract and retain young professionals, survey respondents of all ages highlighted some of the same factors that were evaluated less favorably by those aged 25-44. Respondents emphasized improvement in place-based attributes such as downtown, housing options, and entertainment outlets, while also emphasizing that improvements in public education and job opportunities were necessary to retain recent graduates. The following subsection explores these resident opinions and perceptions in greater detail within the context of community attachment.

FIGURE 18 – SURVEY RESPONSES: WHAT DOES MACON-BIBB NEED TO DO BETTER TO ATTRACT AND RETAIN YOUNG PROFESSIONALS?



Source: Market Street Services

Community attachment

Factors such as the job market, housing costs, and school quality all play a role in determining where people choose to live. However, the degree to which an individual or family is “attached” to a community is often dependent on factors such as satisfaction with a community’s offerings and its ability to support happiness and general well-being. According to the 2010 Soul of the Community report from the Knight Foundation and Gallup, Macon-Bibb residents feel low levels of attachment to their community. This study, conducted over three years in 26 cities in the United States, sought to answer why and to what degree individuals are attached to the communities in which they live. The report described attachment as, “an

emotional connection to a place that transcends satisfaction, loyalty, and even passion. A community's most attached residents have strong pride in it, a positive outlook on the community's future, and a sense that it is the perfect place for them. They are less likely to want to leave than residents without this emotional connection. They feel a bond to their community that is stronger than just being happy about where they live."

In Macon, Knight found that just 19.2 percent of individuals are "attached," while 24.5 percent are "neutral." A majority, 56.2 percent, are "not attached." **Among a comparison group of eight communities with similar population and density profiles, Macon had the least-attached residents.**

Respondents to the online survey generally echoed these sentiments. When asked how likely they were to continue living in Macon-Bibb County, nearly one in five individuals (18.3 percent) indicated that they were unlikely to continue living in Macon-Bibb County. By comparison, recent surveys conducted by *Market Street Services* in two other Georgia communities – Rome-Floyd County and Cobb County – indicated that residents of these communities were more likely to remain in place than those in Macon-Bibb, with only 5.9 percent and 9.6 percent of residents indicating that they were unlikely to continue living there, respectively.

When limited to respondents aged 25-44, 23.9 percent said they were unlikely to remain in Macon-Bibb County. Nearly one-third of those aged 25-44 (33.1 percent) indicated that they were unlikely to raise children or continue to raise children in Macon-Bibb, as compared to just 24.6 percent who said they were "very likely" to do so. More than half of all respondents (52.0 percent) said that their children were unlikely to live in Macon-Bibb once grown, as compared to just 5.5 percent who said their children would be "very likely" to live in the community once grown.

According to the Knight Foundation, the three most important factors that attract and attach people to a community are:

- 1) Social offerings (such as entertainment venues and places to meet)
- 2) Aesthetics (physical beauty, green spaces, etc.)
- 3) Openness (the ability for all kinds of people to build networks and thrive)

Macon-Bibb certainly has positive assets that fall into these three categories, but on the whole, input participants also highlighted some challenges in these areas that could negatively impact its attractiveness to young professionals.

A majority of survey respondents – 57.6 percent – disagreed with the statement that Macon-Bibb is an attractive and desirable place for young professionals, compared to just 37.0 percent who agreed with the statement. Among survey respondents aged 25 to 44, this gap was even more pronounced, with 64.1 percent disagreeing compared to just 33.1 percent agreeing.

During the input process, young professionals from Macon-Bibb praised many of the community's assets including its low cost of living, an interesting and improving downtown, other in-town districts including College Hill, natural amenities such as Lake Tobesofkee, the city's musical heritage, and festivals such as Bragg Jam. Because of these assets and other considerations such as family ties, Macon-Bibb benefits from a strong "boomerang effect" of young professionals returning to the area

after graduating from college or advancing past an entry-level job. But despite this sense of community among Macon natives (or perhaps partially because of it), young professionals also described an insular culture that can be difficult for outsiders to penetrate. Said one participant, "People in Macon still give directions based on landmarks that haven't existed for 20 years – 'turn left at the old K-Mart.' " Another said, "You need to be 'adopted' by someone if you're an outsider." Single young people, in particular, may have a difficult time fitting in. As previously mentioned, a narrow majority of survey respondents – 53 percent to 47 percent – agreed with the statement, "Macon-Bibb County is an inclusive, welcoming place where a diverse range of people can find a home community" with pronounced divergence in opinions between black and white respondents.

In addition to a lack of openness, young professionals also highlighted concerns related to social offerings and aesthetics. There was a consensus among young professionals that it is difficult to get involved socially, due in part to a lack of informal networking opportunities and a limited number of bars and establishments that cater to younger individuals (though the ones that do exist drew praise). Input participants of all ages also described numerous "eyesores" and other aesthetic concerns that negatively impact the community. Vacant lots and boarded up buildings that give the impression that the "town is closed up and empty – not alive." Participants also described a "dirty" city with pervasive litter and trash, and highways and "gateways" into the city that do not "send a welcoming message." Said one participant, "When you cross the Bibb County line, you see weeds growing in the median." But once again, input participants did highlight some areas of the community that had seen great improvement, with many expressing a desire to see successful revitalization efforts extended to other portions of the community with tremendous needs.

Employers contacted during the input process also expressed difficulty in recruiting talent to the region, particularly for high-skill positions. Many employers said recruiting targets frequently had negative perceptions of Macon-Bibb due to factors such as schools and crime, but also culture. One input participant indicated that: "It is very hard to recruit top-line people here. What is the culture? The place is not 'pulled together.' It is very hard to create a value proposition to come here. So I have to tell them that their work will be their life – *not* the community."

CONCLUSION

This Competitive Assessment has evaluated the competitiveness of Macon-Bibb as a place to live, work, and do business, with strengths, weaknesses, assets, and challenges highlighted and framed by nine “stories” that summarize the issues facing the community in 2013 and beyond. These nine stories and a selection of their key findings are as follows:

Race, Leadership, and Trust: Community input participants frequently cited long-standing racial tension among residents and community leadership, tension that has permeated many aspects of community life, particularly efforts to improve public education, revitalize neighborhoods, and enhance economic opportunity. An environment of distrust has resulted, stifling progress despite attempts at productive dialogue. Residents expressed hope that consolidation would bring a new era of collaborative, trustworthy, and harmonized leadership.

Growth Patterns, Fiscal Sustainability, and Workforce Sustainability: Macon-Bibb and the larger metropolitan area possess disadvantageous age dynamics relative to their southern peers. Absent a reversal of the persistent trend of net outmigration, Macon-Bibb’s workforce will necessarily shrink in the years and decades to come. Furthermore, out-migration is driving population stagnation, a trend that threatens the community’s tax base at a time when some its most pressing challenges, such as public education and crime, require significant public investment. Consolidation is expected to bring greater efficiency, while Macon-Bibb has demonstrated that it can still attract sales tax revenue from outside the county as a regional center for healthcare and retail. However, a tremendous focus on talent development, retention, and attraction is critical if the region’s workforce is going to emerge as a strength that is capable of propelling growth and economic development.

K-12 Education: A Divided and Troubled System: Public education was unquestionably the most frequently cited challenge facing Macon-Bibb by residents who participated in the various phases of community input. Residents reported a divided education system along racial and socioeconomic, with a large and deeply entrenched set of private options pulling students from a public system with poor student outcomes. Graduation rates from Bibb County Schools are among the lowest in the state. As a result, one out of every five adult residents of Macon-Bibb has no high school diploma.

Higher Education: Immense Production, Limited Retention: Without question, the quantity, quality, and diversity of higher education options in Macon-Bibb are among its greatest strengths. More than 20,000 students are enrolled in Macon-Bibb institutions of higher education, yet the community’s limited employment opportunities, troubled school system, and limited appeal to some recent graduates has inhibited its ability to retain graduates and create a highly educated workforce.

Income and Poverty: Since the start of the new millennium, Macon-Bibb has experienced a period characterized by no real (inflation-adjusted) income growth, a surge in poverty rates, and a hollowing out of the middle class. At present, more than one-quarter of all adults and one-third of all children in Macon-Bibb live in poverty. Pervasive and generational poverty is intrinsically linked to other community challenges, including but not limited to public education, neighborhood vitality, and crime. Improvements in adult educational attainment levels through dropout prevention and adult re-education will have the greatest long-term effects on the community’s ability to reduce poverty and elevate the standards of living of its residents.

Recession and Recovery: Although Macon’s economy actually weathered the Great Recession relatively well compared to its peers and the rest of the country, it experienced a more troublesome run leading up to the

recession (from 2000 – 2007) and more sluggish and prolonged recovery since the official end of the recession in 2009. Since the turn of the millennium, Macon-Bibb's manufacturing has lost more than half of its jobs. However, other sectors, most notably finance and insurance, retail, and health care services have expanded, indicative of the community's strength as a regional center capable of attracting expenditures from surrounding counties.

Location, Location, Location: Macon-Bibb's strategic location was by far the community's most frequently cited strength by survey respondents. The community is centrally located in the state of Georgia, between the major markets of Atlanta and Savannah, and their corresponding infrastructure assets, Hartsfield-Jackson Atlanta International Airport (the world's busiest passenger airport) and the Port of Savannah (the fourth largest and fastest-growing container port in the country). The community has strong interstate and rail connectivity, and abundant, high-quality water. Collectively, these assets should support a diverse and robust set of manufacturing, distribution, and logistics activities. However, despite many recent success stories, these assets have not been leveraged to their full economic development potential as other community challenges highlighted in this report have weakened Macon-Bibb's competitive as a place to live, work, and do business.

Health in Macon-Bibb: Strong Assets, Poor Outcomes: Very simply, the community is home to a strong and growing set of healthcare assets, but abundant healthcare services have not necessarily translated into a healthy community. Again, other community challenges – particularly pervasive adult and child poverty – have contributed to poor health outcomes and a heavy reliance on social services and other supportive community institutions such as schools, religious institutions, and providers of after-school programs to provide meals and recreational outlets for children.

Quality of Life and Community Attachment: Many residents praised the community's musical and cultural heritage, available amenities including festivals, limited traffic congestion, low cost of living, and notable recent improvements in areas such as downtown loft-living and College Hill when discussing quality of life in Macon-Bibb. However, others expressed continued concerns about crime while young professionals were less likely to be satisfied with the community's social, entertainment, and recreational offerings. According to a study by the Knight Foundation that examined community attachment in a variety of communities nationwide, social offerings, aesthetics, and openness are the three most critical components of a community that lead to resident attachment. Knight found that just 19.2 percent of residents in Macon are "attached" to the community, the lowest among peer communities of similar size and density. This is one of many contributing factors to the aforementioned trends of outmigration that threaten the community's future competitiveness and sustainability.

It is clear from this assessment that Macon-Bibb has a number of valuable assets – assets that are envied by many communities large and small – but the ability of these assets to support community vitality and economic development is inhibited by a set of very serious challenges. That being said, it is important to emphasize that Macon-Bibb is not alone; numerous communities across the South have encountered similar challenges of racial tension, troubled schools, and pervasive poverty, and they have succeeded in addressing these challenges and have emerged as stronger, more vibrant and highly competitive communities. While some have confronted discord and distrust head on, others have found harmony through collaborative efforts to combat other issues of common interest and importance. Macon-Bibb can join these communities by studying best practices and creating innovative solutions of its own. That is precisely what this process is intended to support, and the collaborative leadership embodied in the Steering Committee can and should propel Macon-Bibb toward this end.

ENDNOTES

ⁱ Note: The product of the natural increase and net migration statistics will not necessarily equal the total population change statistic, as is the case here. This is because the Census Bureau includes a “residual” in its population estimates that could result from the application of population controls to estimates for lower levels of geography or from the incorporation of accepted challenges and special censuses to the population estimates.

ⁱⁱ These figures represent the K-12 enrollment and do not include Pre-K programs offered through the public schools.

ⁱⁱⁱ Stucka, Mike. “Bibb school evaluators recommend accreditation, monitoring.” Macon Telegraph. May 1, 2013.

^{iv} Note: The State of Georgia changed the way it calculates graduation rates to a “cohort calculation method” for the 2010-11 school year. As a result, a time series analysis comparing 2011 graduation rates with prior years is impossible, and given the significant methodological differences between the two methods, an examination of trends prior to 2010 may be of limited utility going forward. However, other indicators such as declining GHSGT performance and persistently high dropout rates suggest that Bibb County Schools’ graduation rate would likely have been very low had the cohort model been applied in previous years.

^v Note: Dropout rates are calculated based on the percentage of students who drop out of school in an individual year. Graduation rates measure what percentage of a cohort that enters the ninth grade graduates within four years. As such, graduation rates and dropout rates will likely not total to 100 percent.

^{vi} U.S. Department of Education, National Center for Education Statistics. “The Condition of Education 2011.” May 2011.

^{vii} Weiss, Jonathan D. “Public Schools and Economic Development: What the Research Shows.” KnowledgeWorks Foundation. 2004.

^{viii} The administrative and support and waste management and remediation services sector also lost 1,071 jobs, an 18 percent decline. But most of these losses were driven by a decline in the employment services subsector, meaning that most of the job losses were likely contract positions – possibly temporary jobs – that were staffed through an employment service.

^{ix} Kindig, David A. and Cheng, Erika R. “Even As Mortality Fell In Most US Counties, Female Mortality Nonetheless Rose In 42.8 Percent Of Counties From 1992 To 2006.” *Health Affairs*. March 2013. Vol. 32, No. 3. 451-458.

^x Kliff, Sarah. “This map of America’s female mortality rates is pretty terrifying.” *Washington Post* Wonkblog. April 4, 2013. Retrieved from: <http://www.washingtonpost.com/blogs/wonkblog/wp/2013/04/04/this-map-of-americas-health-is-pretty-terrifying/>