Bayou - River Region Comprehensive Economic Development Strategy 2016 - 2021

SCPDC
South Central Planning & Development Commission

Approved by SCPDC Board October 20, 2016

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INTRODUCTION

A NEW LOOK FOR COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) DOCUMENTS

The new guidelines for the Comprehensive Economic Development Strategy (CEDS) encourage planning districts to embrace technology and reduce the number of written/printed pages in the document. South Central Planning and Development Commission (SCPDC) has initiated the transition with this 2016 document. The charts and graphs in this printed version of the CEDS address a global view of the region. The more detailed information will be available when the CEDS document transitions to the online digital version (Fall 2016). For example, if you are interested in the educational attainment of residents in the region, you will be able to drill down to the specific parishes, municipalities and places within the region. In addition, SCPDC in coordination with the South Louisiana Economic Development Council (SLEC), will be conducting quarterly surveys designed to gauge the shifts within the region. During the transition to the digital interactive format, the accessibility of detailed information will be available as appendices and upon request. The continual expansion of data available to regional stakeholders makes the CEDS a living document.

LEGAL STRUCTURE

South Central Planning and Development Commission (SCPDC) is the state designated Louisiana Planning and Development District 3 and thus recognized as an Economic Development District (EDD) by the U. S. Department of Commerce Economic Development Administration (EDA) and the Delta Regional Authority (DRA) to serve as their partners. By the virtue of the regional stakeholders that make up its membership and the organization's regional focus, SCPDC has a unique perspective on the dynamics shaping the Bayou-River Region's economy. There are eight (8) regional planning districts in the state of Louisiana.

The Economic Development Administration (EDA) mandates each Economic Development District produce a CEDS every five years. This ensures that each district maintains an up-to-date strategy to establish economic goals, address challenges facing their respective region, and guide development priorities. The CEDS process drives districts to examine the region they serve, innovate new ways of supporting development in that region, and stipulate specific metrics for measuring success. Hence, the CEDS process, not just the final strategy document, is critical for districts. At its core, the CEDS is a locally-based, regionally-driven economic development planning process. This Comprehensive Economic Development Strategy is a product of that regionalism, having come out of numerous meetings of public and private stakeholders and a CEDS Committee designed to reflect the diverse interests of the economic actors throughout the Bayou-River Region.

PURPOSE OF THE CEDS

The CEDS will provide useful regional information, guidance, and perspective to local economic development stakeholders, whether they are at the municipal, parish, or regional level. The CEDS is a product of a year-long planning process that was intentionally inclusive of diverse representatives in the public, private, and non-profit sectors throughout the Bayou-River Region. However, the CEDS is not intended to generate mandates to individual cities or parishes within this region. Rather, this CEDS is designed to provide a conceptual framework to be used by stakeholders to strengthen the competitiveness, economic resilience, and quality of life in the Bayou-River Region.

THE CEDS PROCESS

The CEDS process begins with analyzing the current data, trends and conditions in the Bayou-River Region. The CEDS Committee reviews the data and evaluates prior goals, objectives and strategies. Utilizing the framework of SWOT analysis (Strengths, Weaknesses, Opportunities and Threats), the CEDS Committee refines the type of data that is important to the residents of the region and develops new goals, objectives and evaluation measures. These are designed to provide useful regional information, guidance, and perspective to economic development stakeholders. This CEDS utilizes four (4) Themes - Workforce Development, Economic Dynamics, Infrastructure and Community Competitiveness - designed to align with the State of Louisiana, Delta Regional Authority and the U. S. Department of Commerce. Utilizing U. S. Census data and other reliable sources, data for evaluation measures are identified.

This CEDS begins by providing a summary of the current conditions and trends in the Bayou-River Region. The observations in that section are then analyzed and compiled in a SWOT (strengths, weaknesses, opportunities, and threats) framework. Responding to the SWOT analysis, the next section of the strategy is a Strategic Direction and Action Plan that identifies development objectives and outlines strategies for achieving those objectives. Following that section, an Evaluation Framework is developed to gauge progress on the successful implementation of the CEDS. A draft of the CEDS was available for review and Public Comment from July 19, 2016 through August 24, 2016. A copy of the CEDS was posted in a prominent place on SCPDC's website and copies were available at parish offices throughout the region.

THE BAYOU-RIVER REGION

The Bayou-River Region consists of seven (7) parishes: Assumption, Lafourche, St. Charles, St. James, St. John the Baptist, St. Mary, and Terrebonne(Figure 1). All seven (7) parishes are in the state's coastal zone (La. R.S.49:214.24 (C) and (D); Act 588). The region is water-based geographically, economically and culturally. St. Mary Parish is new to District 3, SCPDC, and the region. During the 2015 legislative session, the Louisiana Legislature approved moving St. Mary Parish from District 4 (Acadiana Region) to SCPDC. The culture, needs, industry, and proximity of St. Mary Parish align with those of the Bayou-River Region. The Bayou-River Region encompasses two distinct types of waterways - bayous and rivers. The Bayou area of the region are those parishes located along the bayous - Assumption, Lafourche, St. Mary and Terrebonne; while the River area of the region includes those parishes located along the Mississippi River - St. Charles, St. James and St. John the Baptist.

Assumption, Lafourche, St. Mary and Terrebonne parishes (the bayou area of the SCPDC district 3) are leaders in the energy and shipbuilding sectors. The river area of the region -St. Charles, St. John the Baptist and St. James parishes, has one of North America's largest concentrations of heavy manufacturers (petroleum, refineries, chemicals, mining, machinery). In addition to these major industry clusters, the region's economy is heavily influenced by the transportation, and warehousing clusters. The seafood and agricultural industry clusters are also regionally significant. The economic strength of the Bayou-River Region is a reflection of its strategic location (navigable waterways), competitive market access (stateside and international) and specialized labor force (energy and marine).

The growth of the region is a result of sound strategic planning from a diversified cross section of public and private stakeholders. The region's overall strategy is to focus on resiliency and diversifying its economic base by targeting industries conducive to growth. The Bayou-River Region has a long history of developing and adopting CEDS documents, and this strategy builds upon that history. The communities within the region have seen tremendous growth in recent decades, and there are clear reasons for continuing to pursue the policies and strategies that have driven so much economic development in recent times. However, the region continues to experience the economic fluctuations associated with the energy industry clusters.

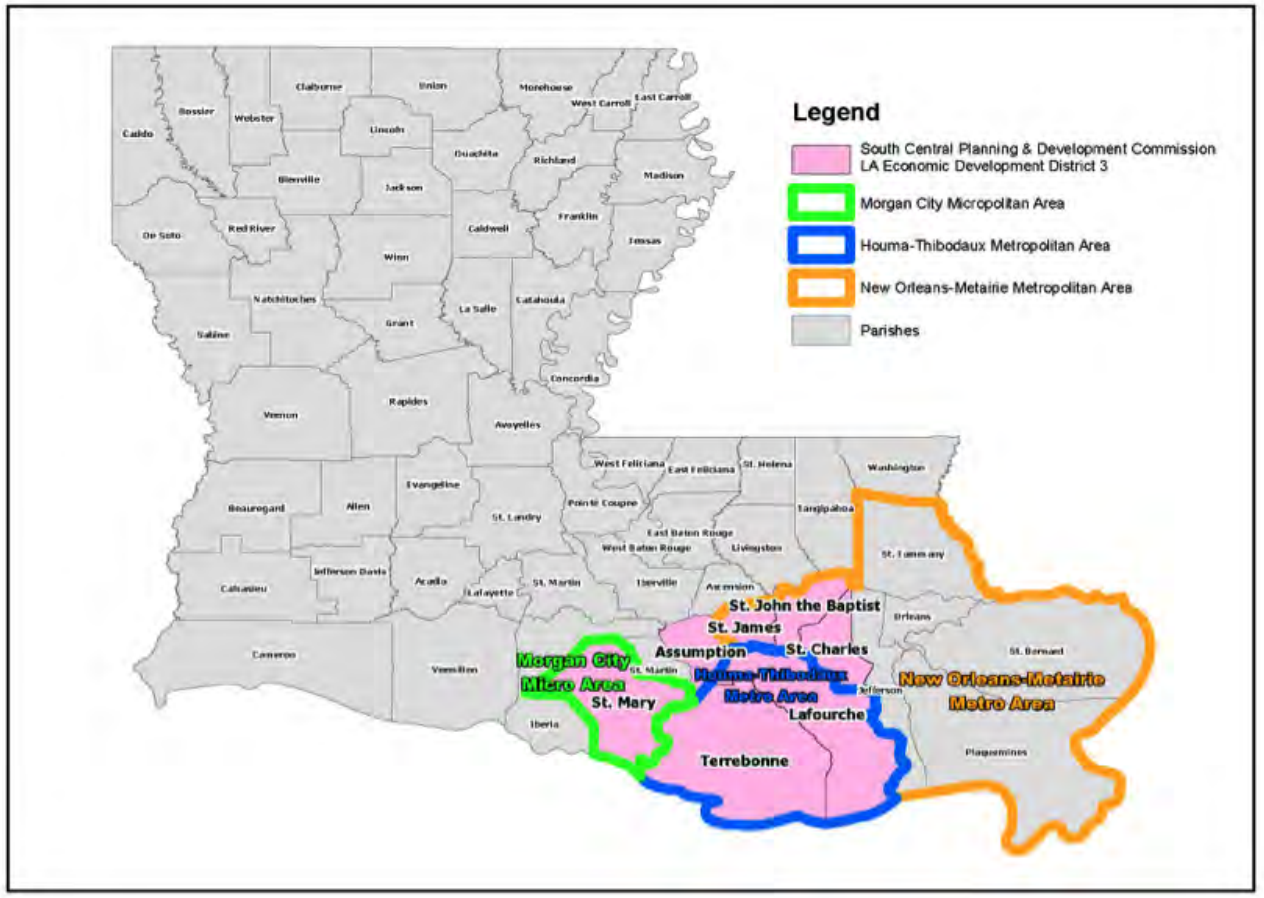

Figure 1 - SCPDC District #3

The Bayou-River Region crosses two (2) distinctly different Metropolitan Statistical Area's (MSA)-the New Orleans MSA and the Houma-Thibodaux MSA; and one Micropolitan Statistical Area (µSA) - Morgan City. Assumption Parish is considered rural and not included in any MSA or µSA. This crossover of parishes between metropolitan, micropolitan and rural areas creates challenges in dissecting data with a specific Bayou-River regional focus. This CEDS begins the process of analyzing and refining the type of data that is important to the residents of the region. Thereby creating a database of useful information upon which decisions can be made. The goal is to provide access to regional data via the SCPDC website.

Therefore, this strategy looks to identify ways of shaping the way the region grows to support a resilient and robust local economy that is increasingly competing on a global scale.

BACKGROUND SUMMARY

POPULATION GROWTH

The Bayou-River Region has experienced mixed population shifts over the past five years (Figure 2). These shifts or the push/pull factors of employment (Bureau of Labor Statistics) are reflective of the economy. Most people move for economic reasons. Historically and culturally, the shifts in the Bayou-River Region are influenced by the oil and gas sector (Horizon Oil Spill, oil prices), disaster recovery initiatives (weather and man made events) and the manufacturing sector along the Mississippi River. In addition, due to the nature of the extended work shifts (U. S. Department of Labor, OSHA) associated with these sectors, many workers live outside of the region and do not relocate their families here. When the oil and gas sector is depressed the bayou parishes of Assumption, Lafourche, St. Mary and Terrebonne experience population out-migration or push. That is, workers follow the jobs. The expansion of manufacturing plants along the Mississippi River has offset the recent down turn in the energy industries, which include the oil and gas sectors. As a result, the impact of the net migration on the regional population from 2010 - 2015 shifted geographically in response to the economy and employment but has remained more stable with a slight decrease (-.03%). Regionally, Lafourche and Terrebonne parishes experienced slight growth between 2010 and 2015. During the same 2010 - 2015 time frame, the population of St. Charles parish remained flat while the parishes of Assumption, St. James, St. John the Baptist, St. Mary experienced a decrease. This population trend is expected to continue throughout 2016 as workers gravitate towards employment. The forecast for 2017 predicts the oil and gas sector will improve (Scott, et.al, 2015), thereby increasing the potential of in-migration or pull to take advantage of the higher-paying jobs associated with that sector.

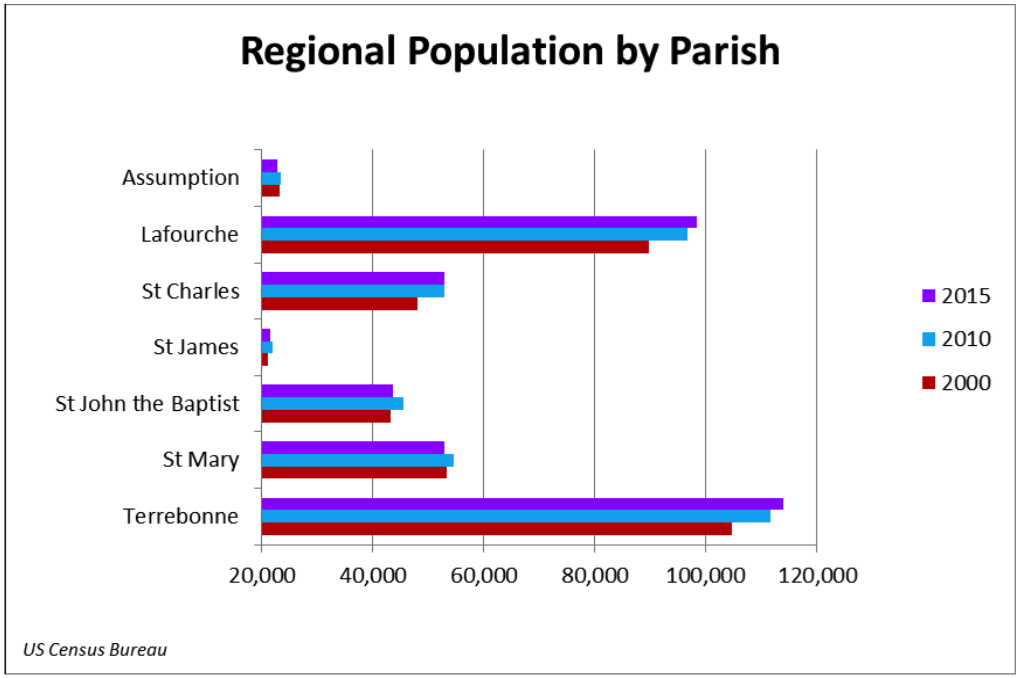

Figure 2 - Regional Population by Parish

JOBS AND EMPLOYMENT

Historically, in terms of overall employment, the ebb and flow within the region's two major industry clusters – manufacturing and energy – tends to balance the overall loss of jobs across these clusters. While regionally jobs increased by 8,174 over the last 5 years (2010 - 2015), the recent drop in oil prices has contributed to the loss of more than 5,000 jobs (Scott, et.al, 2015). In 2015, 6.5% of the employment in Lafourche and Terrebonne parishes was directly related to oil and gas. This was more than double the 2.4% statewide average. Based on the current regional economic trends, the energy sector is expected to regain approximately 1,000 jobs within the next two years (Scott, el.al, 2015).

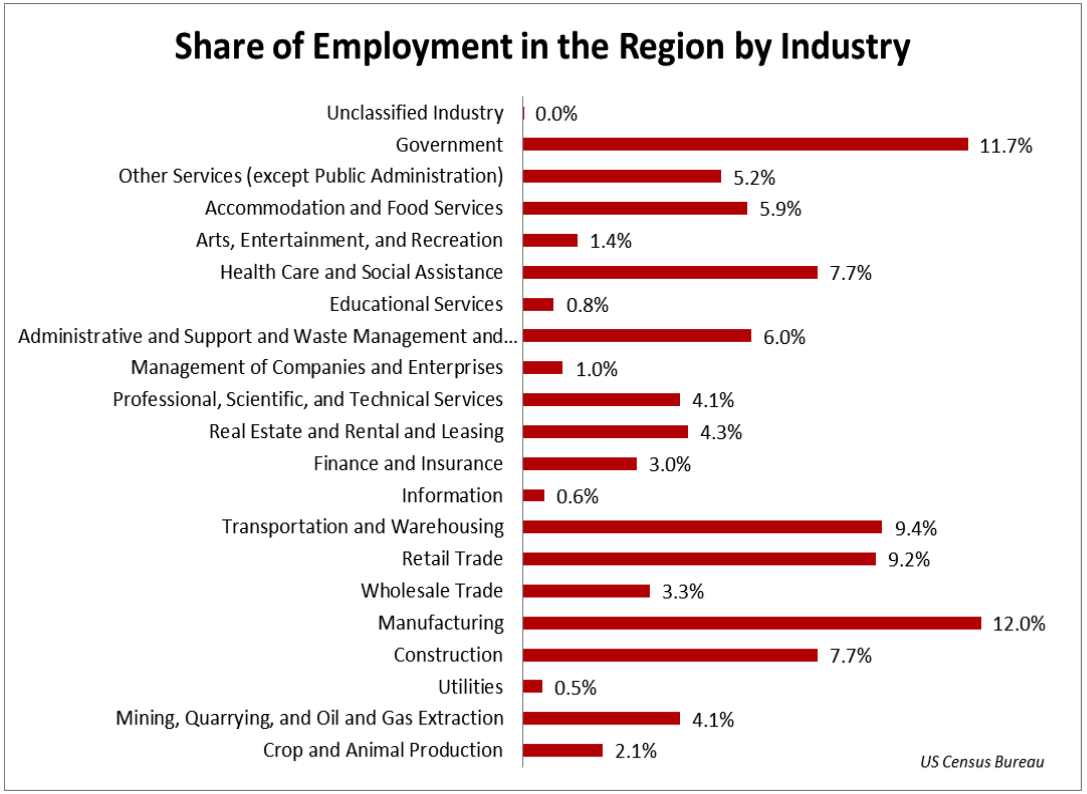

Figure 3 - Share of Employment n the Region by Industry

Some of the key employment sectors creating jobs in the region include government, manufacturing, transportation/warehousing, retail trade, healthcare and construction (Figure 3). Together, these sectors comprise 58% of the region's employment. Across several sectors, employment requires post-secondary training or certification. In the manufacturing sector, nearly all of the employment is engaged in refining and producing petrochemical related products. These jobs are located along the Mississippi River.

Essentially, this forecast reflects an economy that is resilient to the shifts within the energy sector. The 2017 employment projections within oil and gas sector point to a slow recovery resulting in approximately 1,000 recovered jobs in 2017 (Scott, et.al, 2015).

Those sectors which employ a large number of workers in the region – government, manufacturing, transportation, warehousing, retail trade, and healthcare – are expected to continue driving the regional economy.

ENERGY, MANUFACTURING, AGRICULTURE, AND SEAFOOD

South Central Louisiana contains one of the world's most productive industrial corridors along the Mississippi River. Industry flourishes along the many other waterways and coastline. These areas include some of the largest concentrations of oil and natural gas extraction and refining and chemical manufacturing capacity in the United States. The region has also supported one of the world's most productive "wild caught" fisheries, producing shrimp, crab and fin fish. In addition, the coastal areas cultivate oysters. Economically, the region has capitalized on the abundant natural resources, natural built waterways, other infrastructure, and local knowledge. These natural resources are a foundation for and contribute to the resilient culture of the Bayou-River Region.

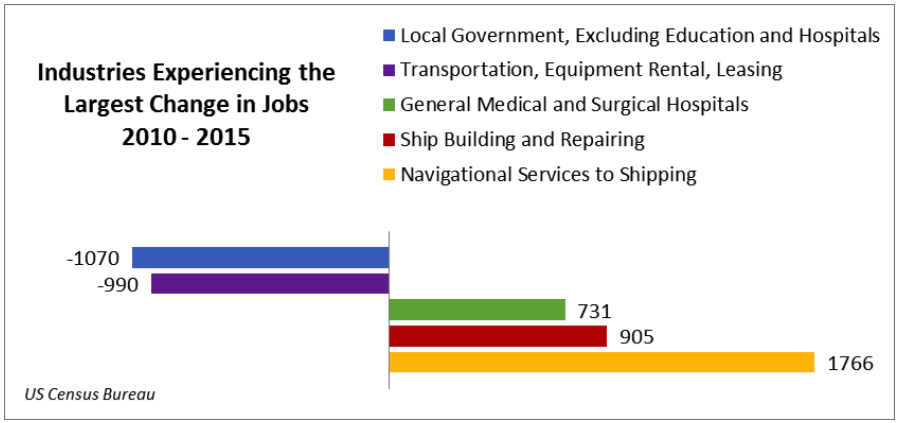

Figure 4 - Industries Experiencing the Largest Change in Jobs 2010 - 2015

The growing industries for the Bayou-River Region include medical, ship building and repair, and navigational services to shipping (Figure 4). The declining industries include local government, transportation, equipment rental, and leasing. With the downturn in the oil and gas industry, numerous oilfield related service companies have been negatively impacted.

The shift in occupation growth runs parallel to the shift in the growing and declining industries. Jobs related to the agricultural and fishing industries have declined. Historically, jobs within these sectors have remained a part of the regional culture. As the number of jobs within the higher paying energy and manufacturer sectors decline, residents turn to the natural resources of the region to supplement incomes – fishing, hunting, truck-farming, etc. One example of the regions cultural resilience is demonstrated as workers utilize many of their maritime skills needed in the oil and gas industry to supplement their income by way of fishing and shipbuilding.

The growing occupations in the region include (1) sailors and marine oilers, (2) welders, cutters, solderers and brazers, and (3) captains, mates, pilots of water vessels (Figure 5). Two of the factors contributing to this change in occupational job growth are the retirement of an older skilled workforce and the global demand for these skills.

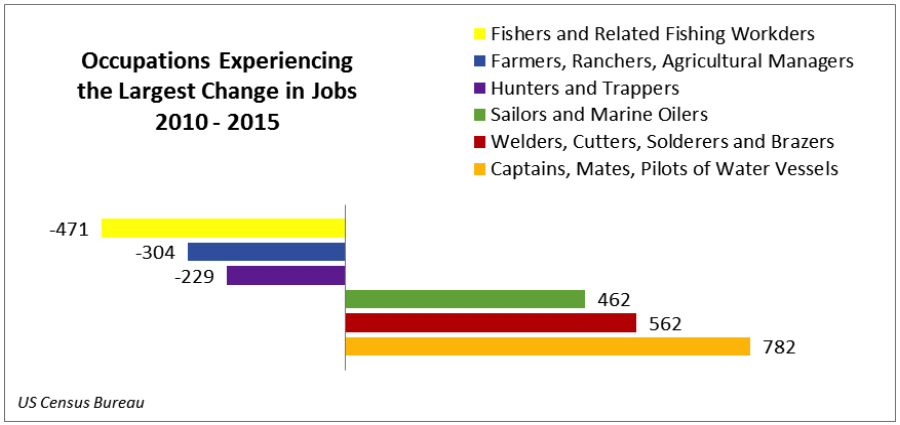

Figure 5 - Occupations Experincing the Largest Change in Jobs 2010 - 2015

COMMUTING PATTERNS

The employment shifts within the major industries and occupations of the region impact the accessibility to jobs, often creating an out-migration or pull to areas of employment. In the Bayou-River Region, 22% of workers commute more than 50 miles to work and 61% of the region's workers commute 10 miles or more to work (Figure 6). Due to the extended work shifts in the cluster of manufacturing and energy related occupations, a 10 or more mile commute to work is not uncommon in the Bayou-River Region. In the manufacturing sector, this may be a daily commute; in the energy sector it could be daily or one round trip commute every 7, 14,or 21 days.

One challenge for the region is providing affordable and equitable access to job opportunities. The regional transportation infrastructure to support the access to job opportunities is inadequate. Throughout the region, access to major highways and jobs often requires travel over crowded two-lane roadways (LA 1, Hwy 308, LA 20, LA 24, etc.) traversing the bayous and swamps (Figure 10).

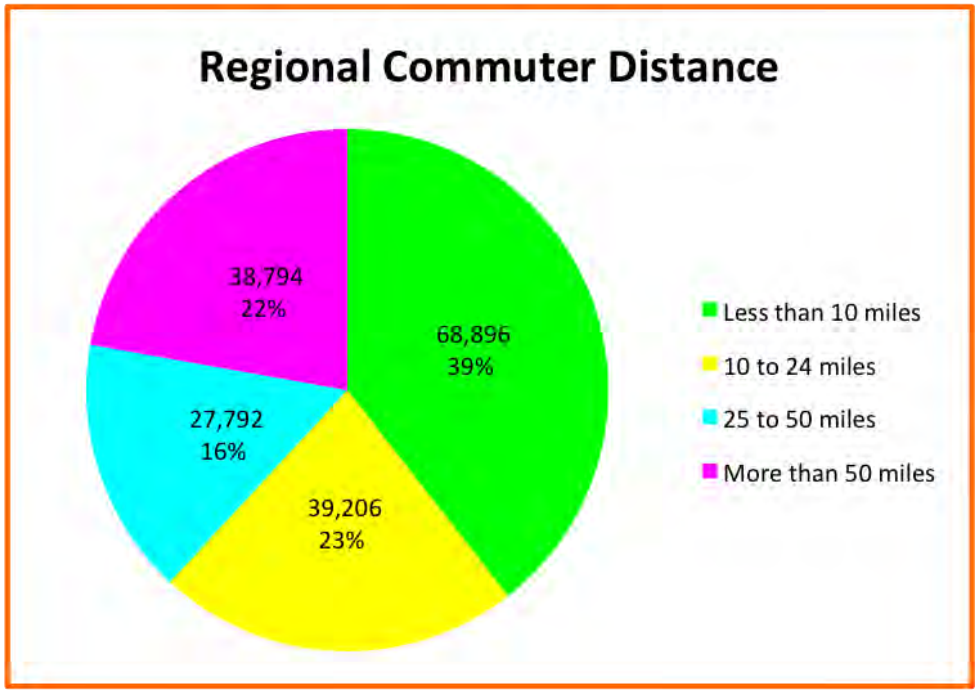

Figure 6 - Regional Commuter Distance

WAGES

Regionally, the average 2015 wage paid by industry ($54,837) is slightly higher than the national average of $54,496 and is well above the state average of $46,020 (Bureau of Labor Statistics). Looking at the entire Bayou-River Region and all industry sectors, there is a challenge the region's economy faces- filling the middle-skill job opportunities. Although job creation figures in the region are strong, much of the job growth in the region has taken place in low-skill and low-wage occupations. The two largest segments of the regional economy are the manufacturing and government sectors, followed by transportation and retail sales. While these sectors are important sources of employment in the region, job creation in middle- and high-skill sectors is an important complement. Middle skill jobs are those that require some post-secondary education, training or certification beyond high school but less than a bachelor's degree. Wage disparity and unemployment are tied to regional educational attainment and access to job opportunities.

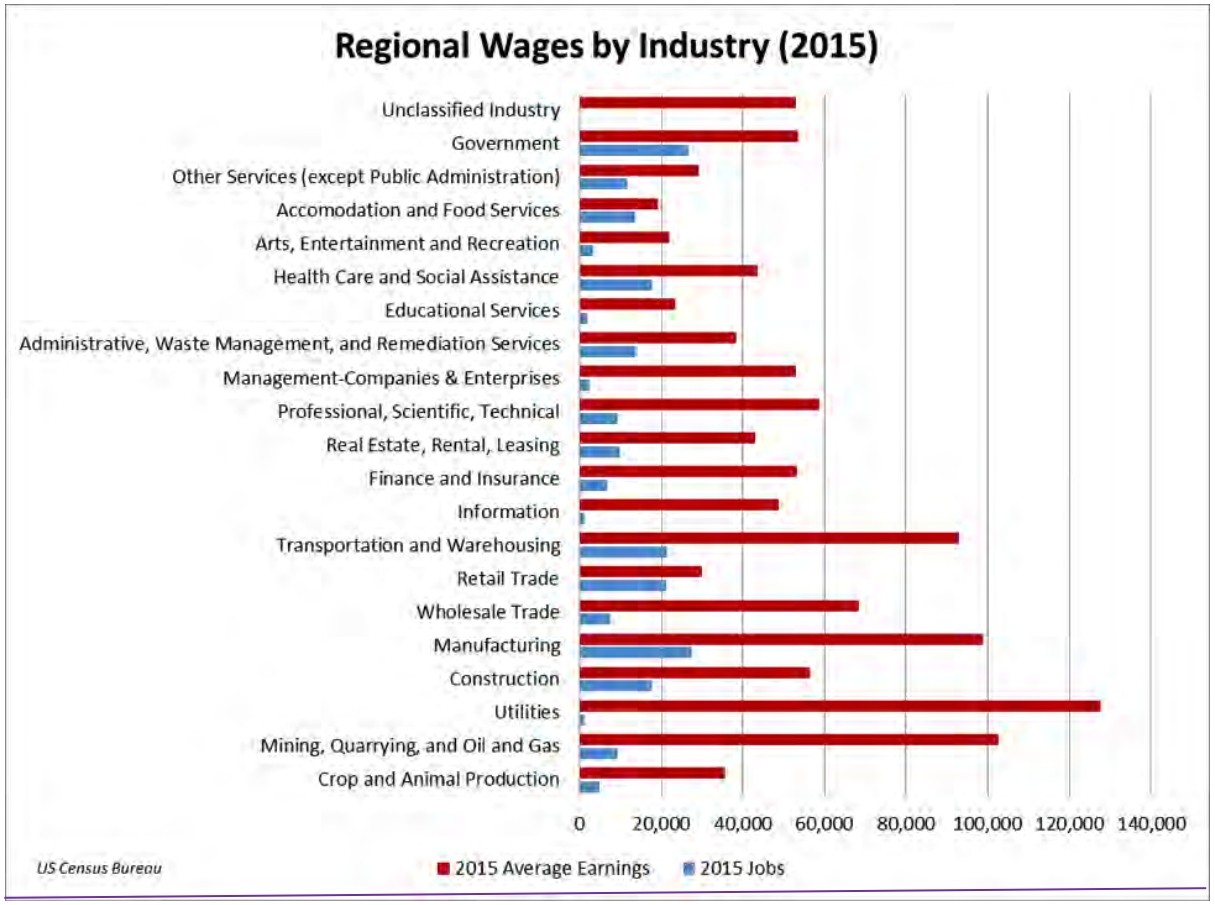

Figure 7 - Regional Wages by Industry (2015)

The average hourly rate in the region as of the first quarter of 2015 was $26.91. This is slightly higher than the national average hourly rate of $26.20 (Bureau of Labor Statistics). The higher paying jobs are associated with manufacturing, which holds one of the highest share of jobs. As illustrated in Figure 7, other industries with higher paying jobs have a much smaller share of total jobs (utilities, information, educational services , etc.). Throughout the region there are many workers in the lower-wage jobs, such as: retail, arts, recreation, etc. (Figure 7). As wages rise, the number of people employed in the higher paying positions typically falls.

Recently released 2015 regional wage data reflects the highest estimated employment at the low end in the position of cashiers at $9.25 per hour or $19,242 annually; and at the high end as boat captain at $48.88 per hour or $101,675 annually (Figure 7).

Five (5) parishes – Lafourche, St. Charles, St. James, St. John the Baptist, and Terrebonne - in the Bayou-River Region had average weekly wages over $1,000. St. Charles Parish and St. James Parish had average weekly wages of over $1,300. Nationally, the average weekly wage is $1,048. The higher paying parishes are concentrated around the metropolitan statistical areas of Houma and New Orleans.

EDUCATION AND WORKFORCE

Overall, the Bayou-River Region has a uniquely skilled workforce. This global workforce includes mariners and oilfield workers employed around the world in the shipping and energy sectors. The energy sector workforce has evolved simultaneously with the oil and gas industry. Historically, a high school diploma was not required to secure a high-skill, high-paying oil field job. As technology has evolved, the manufacturing and energy sectors are requiring more middle-skill workers; those with some level of post-secondary education and/or training. South Central Louisiana Technical College and Fletcher Technical Community College along with Nicholls State University and other training institutions in the region collaborate with business and industry to align education and training programs with job opportunities.

According to the 2010 – 2014 Census Bureau American Community Survey, an estimated 12% of residents in the region aged 25 and older had a Bachelor's degree (Figure 8). That compares to 15.2% for Louisiana and 18.7% for the entire U. S. Louisiana ranks 44th in the nation. Washington DC has the highest at 24.3% and West Virginia has the lowest at 11.8%.

The latest data from 2012 indicates middle-skill jobs account for 58% of Louisiana's labor market, but only 46% of the state's workers are trained to the middle-skill level. High-skill jobs hold 26% of the labor market and low-skill jobs hold 16% of the labor market. The demand for middle-skill jobs is projected to remain strong at 56% through 2022 (National Skill Coalition).

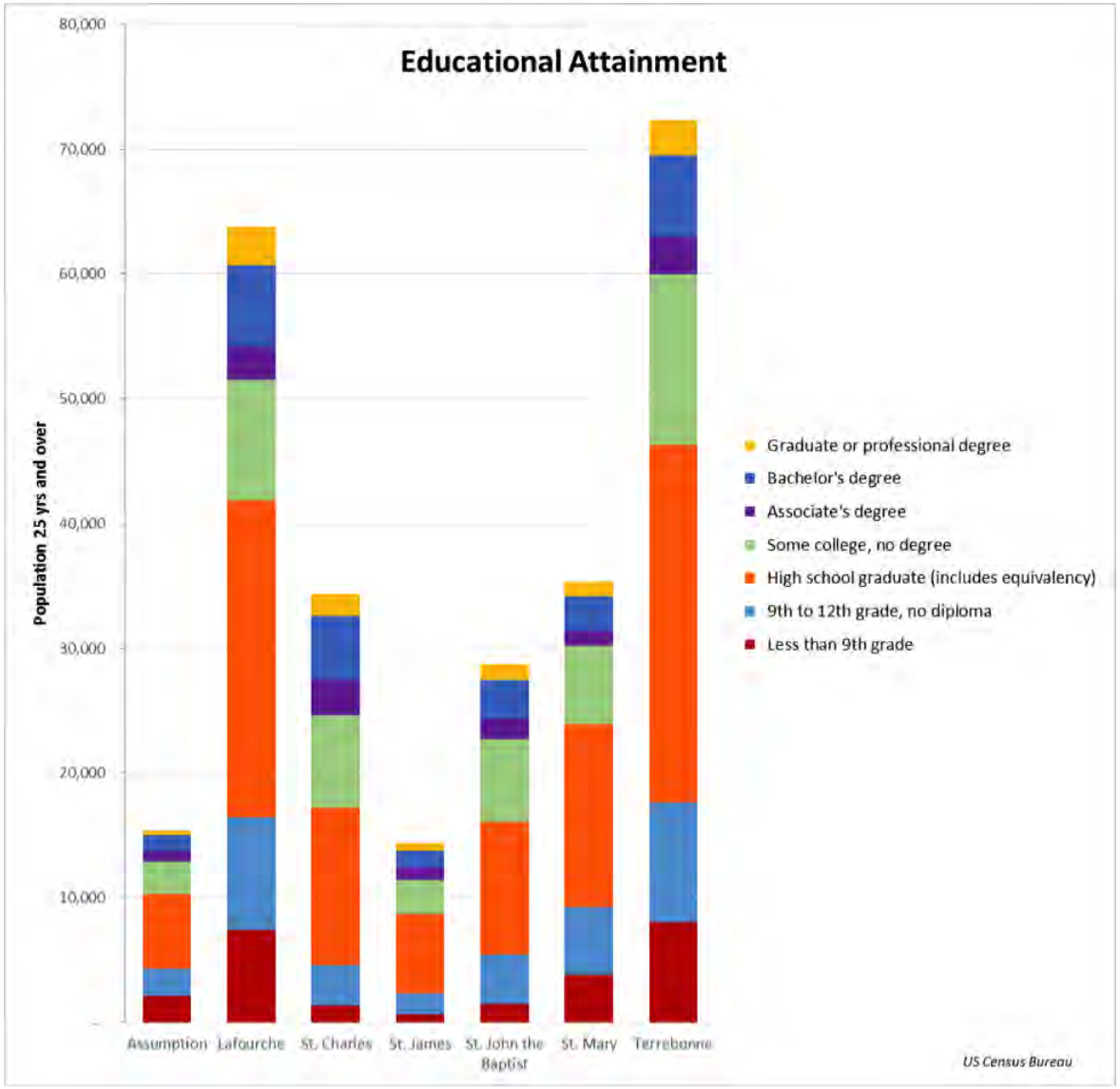

Figure 8 - Educational Attainment

RESILIENCY AND INNOVATION

Resiliency is defined as the ability to recover quickly from events or shocks. One of the economic strengths of the Bayou-River Region is the culture and resiliency of its people. Few states experience the impact of the turmoil within the oil and gas sector as the state of Louisiana and, specifically, the Bayou-River Region. Historically the region has proven its resiliency by its ability to adjust to the fluctuations in not only its largest economic sectors (oil, gas, manufacturing, and seafood) but also in its response to disasters that impact its culture, coastal environment and the livelihood of its residents. The flexibility of skill sets (maritime skills, etc.) allow workers to move between the energy and seafood sectors as the jobs adjust to the economic fluctuations.

Bayou and River Region Patents (2000- 2013)															
Parish	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	**Total**
Terrebonne	12	14	10	14	10	17	20	16	5	15	15	6	19	15	188
Lafourche	5	9	4	1	5	6	5	5	5	7	7	1	8	10	78
St. Mary	3	9	9	8	7	4	5	2	3	1	1	3	13	4	72
St. Charles	8	4	9	3	3	1	4	2	1	4	3	3	1	7	53
St. John the Baptist	4	0	0	1	0	1	1	0	0	1	2	3	1	1	15
St. James	2	4	0	0	0	0	0	0	0	0	0	0	0	1	7
Assumption	0	1	1	0	0	0	0	0	0	0	0	0	0	0	2
US Patent & Trademark Office's Technology Assessment and Forecast													regional total		415

Figure 9 - Bayou-River Region Patents (2000 - 2013)

One example of regional resiliency is the number of patents obtained in the region (Figure 9). Between 2000 and 2013, the Bayou-River Region generated a total of 415 patents for new inventions (U.S. Patent & Trademark Office's Technology Assessment and Forecast). This include 127 individually owned patents in addition to the 288 patents for companies such as Deere + Company, Halliburton Energy Services, Inc., Innovatit Seafood Systems, LLC., Marathon Oil Company, Alford Safety Services, Inc., Wellbore Specialties, LLC and others.

REGIONAL INFRASTRUCTURE

PORTS, AIRPORTS, TRANSPORTATION, BROADBAND AND HOUSING

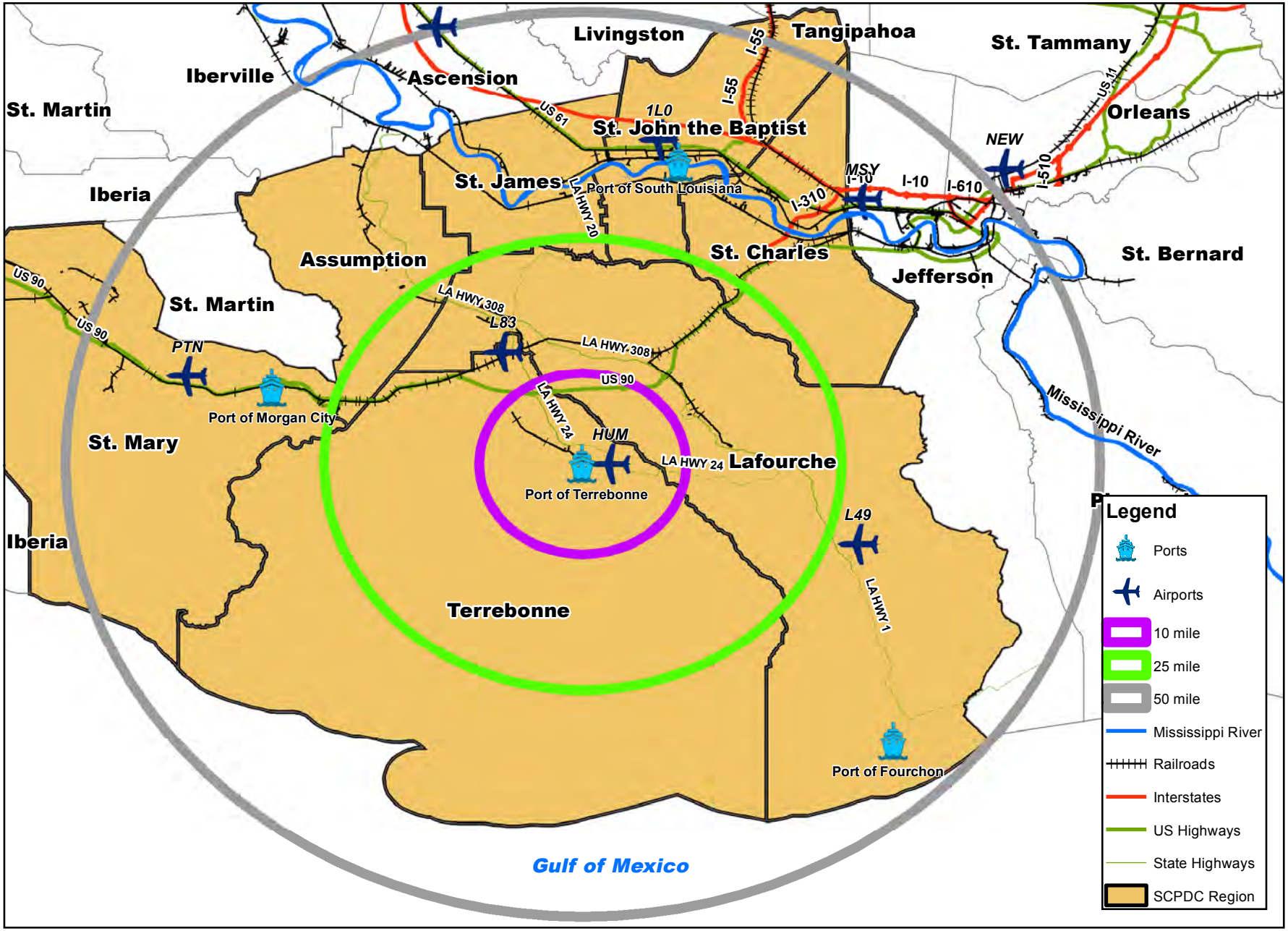

Figure 10- Economic Geography of Regional Commuting Distances

PORTS AND AIRPORTS

The ports and airports in the region are vital to the economic growth of the regional industries. The nature of the industry clusters (energy and manufacturing) are dependent on the movement of goods, services and workers. The ports and airports within the region are hubs and prominent modes of transportation for these industries. There are additional airports and heliports throughout the region. This section of the CEDS addresses those airports associated with the ports.

THE PORT OF SOUTH LOUISIANA, located along the river area of the Bayou-River Region, is America's largest tonnage Port District and the largest tonnage port in the western hemisphere. Located between New Orleans and Baton Rouge, the port stretches 54 miles along the Mississippi River covering St. James, St. John the Baptist and St. Charles Parish. In addition, with easy access to Interstate 10, one of North America's largest concentrations of heavy manufacturers is located within the area. Industry leaders in the energy and chemical sectors continue to invest billions of dollars as they expand operations to capture market opportunities. These advantages have also attracted investment in support industries including logistics, business services, metals and others. http://portsl.com/

1LO - Port of South Louisiana Executive Regional Airport's close proximity to Globalplex Intermodal Terminal, the Port's public facility, rounds out the intermodality of the terminal by conceivably allowing the Port to move cargo by water, rail, highway, and air. http://portsl.com/airport-services/

PORT FOURCHON, located in the bayou area of the Bayou-River Region, services 90% of the Gulf of Mexico's deep water oil production. Traffic studies have shown that up to 1,200 trucks per day travel in and out of Port Fourchon. This port, located in Lafourche Parish, plays a strategic role in furnishing the country with about 18% of its entire oil supply. In addition, Port Fourchon is the land base for Louisiana Offshore Oil Port (LOOP), which handles 10% of the nation's domestic oil, 20% of the nation's foreign oil, and is connected to 50% of the U.S. refining capacity. LOOP is the only U.S. deep water port capable of offloading Very- and Ultra-Large Crude Carriers. http://portfourchon.com/

L49 - Leonard Miller Jr. Airport (GAO FBO), is located in Galliano, LA and a 22-mile drive (10-minute helicopter ride) from Port Fourchon . The 6,500 foot runway is capable of accommodating large business jets. http://www.portfourchon.com/clients.cfm

PORT OF TERREBONNE owns a 680-acre site in Houma, LA (Terrebonne Parish) on the Houma Navigation Canal – within one-half mile of its intersection with the Gulf Intracoastal Waterway. The Houma Navigation Canal is a direct route to the Gulf of Mexico with no overhead restrictions. It also ties the Port of Terrebonne with Port Fourchon. This location puts the port in a strategic position to take advantage of cargo flows and marine traffic on both waterways. The port slips have the same published dredged depth of -15 NGVD as the Houma Navigation Canal. The port is ranked 98 out of 150 US ports with cargo tonnage exceeding 2.5 millions tons per year. It is one mile west of LA Highway 57 and the Houma-Terrebonne Airport. http://terrebonneport.com/

HUM - Houma-Terrebonne Airport is 4.5 miles from the Port of Terrebonne. It offers two intersecting runways (6,508 x 150 - full ILS and 5,000 x 200 – non-precision approach runway). http://houma-airport.com/

THE PORT OF MORGAN CITY is located in Morgan City, LA (St. Mary Parish, at GIWW WHL Mile Marker 95) and is the focal point of waterborne transportation in four directions. Traffic between points in the southwest United States and the Upper Mississippi River Valley saves approximately 342 mile per round trip by using the Morgan City-to-Port Allen Alternate Route rather than the Gulf Intracoastal Waterway via the Harvey Locks at New Orleans. The port has been successful in supporting offshore oil and gas operations and has expanded to agricultural dry goods. International cargo can be received at the Port of Morgan City and prepared for overland shipment to U.S. markets or other international markets. The Intracoastal Waterway System and the Inland Rivers of the Upper Mississippi River Valley reach markets in 37 U.S. states. The BNSF rail spur provides easy access to the U.S. and Union Pacific rail system. The port has immediate access to the future corridor of I-49 (currently four-lane Hwy 90) and is ideally situated 70 miles south of Baton Rouge, 70 miles east of Lafayette and 90 miles southwest of New Orleans. http://portofmc.com/

PTN - Harry P. Williams Memorial Airport is located in Patterson, LA, 11.3 miles from the Port of Morgan City.

THE PORT OF WEST ST. MARY is located on the Gulf Intracoastal Waterway in St. Mary Parish. With campuses in Baldwin (14 acres), Franklin (main office) and Louisa (945 acres), the port is situated to support the oil and gas industry as well as the seafood industry. The port has expanded to include a 105-acre site south of Highway 90 on the west bank of the Charenton Navigation Canal. An industrial park with an access slip of 3.7 acres of water frontage is currently being developed. http://www.portofwsm.com/

TRANSPORTATION

In recent years, the primary focus of transportation planning has been on commuter traffic and cars rather than on the movement of goods. The federal government is now focusing some of its funding efforts on freight infrastructure, revisiting the creation and maintenance of interstate highways rail services, maritime and air ports. For the first time federal transportation legislation includes the national freight infrastructure. The 2012 legislation "Moving Ahead for Progress in the 21st Century Act" (MAP-21) provides for the designation of a national freight network critical to movement of freight within the country with goals to improve a region's freight network, strengthen the ability of the region to access national and international trade markets, and support local economic development (Figure 10 and 11).

The Louisiana Department of Transportation has updated the statewide transportation plan to comply with federal legislation and to include "mega-projects". The 2015 Louisiana Statewide Transportation Plan Update defines, a mega-project as "a very expensive or large scale transportation improvement that would have a regional or statewide impact and would require special funding outside of normal DOTD funding mechanisms." The plan identifies mega-projects for the Bayou-River region and these are listed in Figure 11.

Bayou-River Region Transportation Megaprojects

Area	Project	Total Costs
Lafourche and St. Charles, St. Mary	1-49 South	$190,000,000
Mississippi River	Deepen Mississippi River	$300,000,000
Louisiana Coastal Access Channels	Deepen Coastal Access Channels	$300,000,000
Lafourche	LA 1 South Phase 2	$320,000,000
Lafourche and Terrebonne	Houma-Thibodaux North South Connection to La 3127 – Interstate Access Highway Phase I	$550,000,000
Terrebonne	LA 3040 – Houma Tunnel	$65,000,000
River Region	I-10/I-55 Interchange- Build new freeway connection	$110,000,000
South Central LA/St. James Parish	I-10 Sunshine Bridge to Veterans Memorial Bridge, LA 22 to LA 641	$120,000,000

2015 Louisiana Statewide Transportation Plan

Figure 11 - Bayou-River Region Transportation Megaprojects

BROADBAND

Broadband access is essential in today's economy. The limited access to broadband in rural areas of the Bayou-River Region impacts levels of educational attainment and access to information. The decision to expand businesses in the rural areas is influenced by this limited access. Currently the Louisiana State Broadband Mapping Initiative has issued a "Call for Data". Broadband Providers have been requested to provide data to the state to build the Louisiana Broadband Map. SCPDC will utilize this data to address the specific broadband voids within the Bayou-River Region.

HOUSING

With the population and employment shifts taking place in the region, there has been an expansion of housing stock in the Bayou-River Region areas. Along with the rise in housing stock, the values of homes in the Bayou-River Region have risen moderately since 2014. Only St. Charles Parish's median home value of $181,000 exceeds the national median of $176,700 (Figure 12). Compared to the state median of $138,900, St. Charles Parish is joined by St. John the Baptist Parish at $149,200.

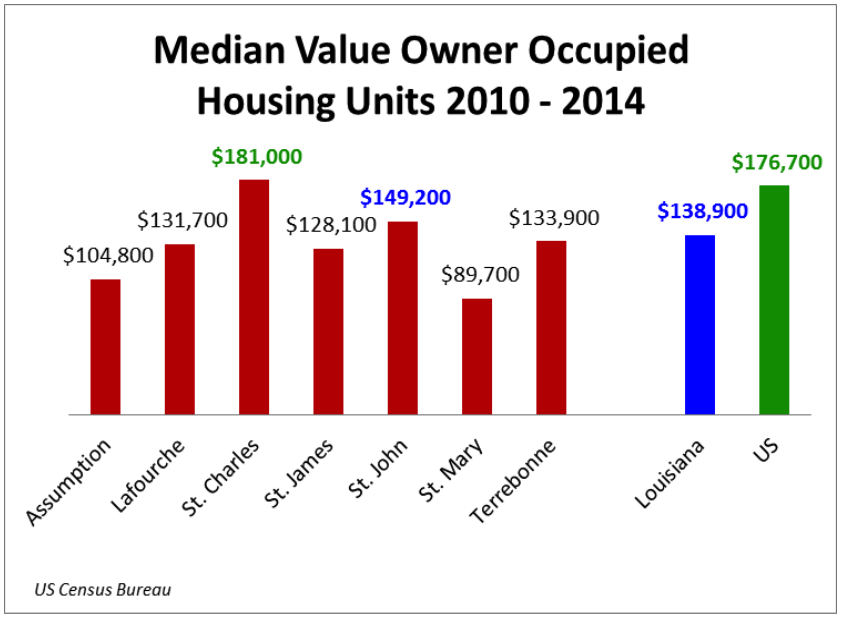

Figure 12 - Median Value Owner Occupied Housing Units 2010 - 2014

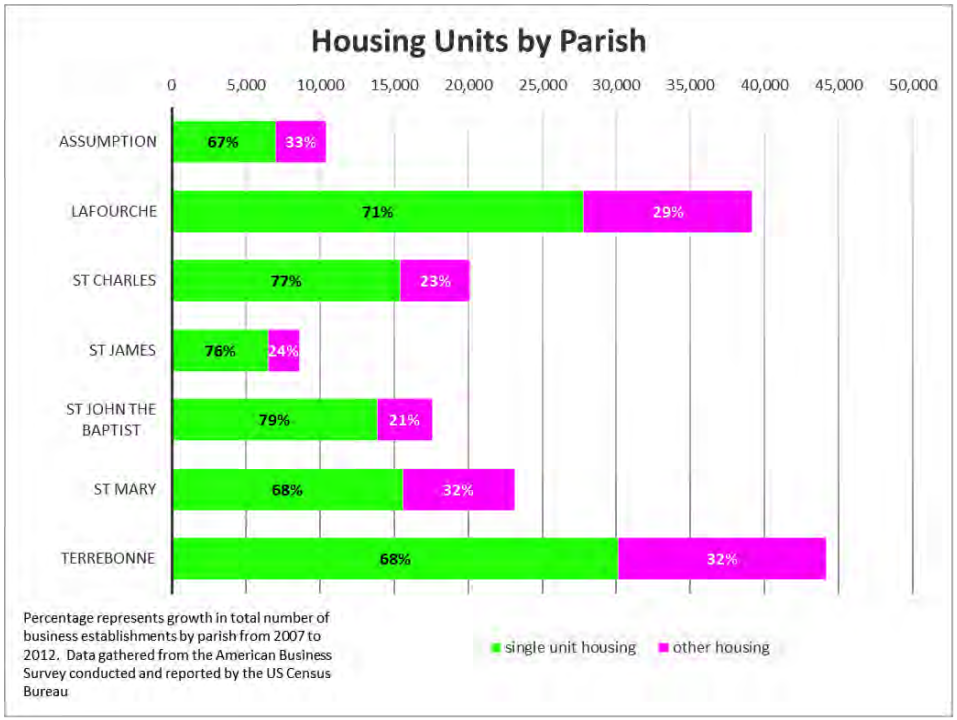

Figure 13 - Housing Units by Parish

Most housing in the Bayou-River Region is single-family detached (Figure 13). Mobile homes are the second most prevalent housing type. The region has a limited amount of multi-family housing, especially apartment buildings with 10 units or more. The exception is in the concentration of apartments catering to students enrolled at Nicholls State University.

As a result of Hurricane Isaac, St. John the Baptist Parish government was awarded over $30 million in grant funds through the Department of Housing and Urban Development (HUD) CDBG Disaster Recovery Program and the State of Louisiana Office of Community Development/Disaster Recovery Unit to address housing shortage and needs of the parish residents The housing programs are designed to address storm damages in addition to addressing the needs of low-to-moderate income (LMI) and non- LMI homeowners that were impacted by Hurricane Isaac.

SWOT ANALYSIS

Responding to the trends outlined in the previous section requires an organizational framework that categorizes those trends and leads to development responses. This CEDS utilizes a SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats) to do that. The CEDS Committee reviewed the previous SWOT, goals and objectives for the region. Current data was reviewed and utilized to evaluate the achievement of the previous goals and objectives. Starting from this point, the CEDS committee conducted a SWOT analysis and developed new measurable goals and objectives for the region. The SWOT framework is presented below. The goals, objectives and actions are presented as "Themes". Each theme and component is analyzed in the subsections that follow.

Strengths

- Post-secondary Education Opportunities
- Natural Resources
- Infrastructure (Waterways)
- Culture/Resilience

Weaknesses

- Cultural Attitude Towards Value of Education
- Shortage of Skilled Labor
- Infrastructure (Non-waterway)
- Regional Competition
- Coastal Erosion/Subsidence

Opportunities

- Harmonize Development Efforts in the Region
- Diversify Regional Economy by Developing Industry Clusters
- Advocate for Middle-skills Job Development
- Develop Regional, National and Global Brand Appeal Messages About the Value of This Region to Overcome Negative Perceptions

Threats

- Over-Reliance on Few Industries for Employment
- Development Costs Impacted by Legislation – Biggert Waters
- Migration Patterns
- Growth vs Place Building

Strengths

Meeting the challenges of a changing workforce is one of the strengths of the region. The multiple ***post-secondary education and training*** - Nicholls State University, Fletcher Technical and Community College, South Central Louisiana Technical College, and other private training and technical schools- in the region provide an economic driver for the region, ensuring the capability to develop and maintain a skilled workforce. These post-secondary certification and training programs are in addition to the K-12 workforce training initiatives adopted by local school boards.

Water has been the areas greatest ***natural resource***. Seafood and agriculture became dominant industries as plantations and communities were built along the bayous and rivers. The prominence of these industries in the culture and eyes of the people of this region are still present. Even today, these industries are driven by water. However, they are increasingly overshadowed by the higher paying jobs in the energy and manufacturing sectors of the region. Along the river, many plantations have been replaced with refineries, manufacturing plants and transportation terminals that service the nation and world.

The abundance of ***natural resources*** in the region supports not only the industries that rely on waterways for transport of products, but also the recreational and tourism industries. These same natural resources are instrumental to the ***culture and resiliency*** of the region. Hunting, fishing, and trapping are embedded in the regional culture as a means of recreation as well as providing economic support to families and businesses.

The ***infrastructure in terms of waterways*** is strong.

Weaknesses

Though the region has numerous strengths, it does also have competitive disadvantages or weaknesses. First, though employment in the region is stable, it is strongest at the high- and low- skill levels of the employment spectrum. In the middle-skill jobs, there is often a mismatch between the applicant's credentials and the skills an employer expects.

Historically, higher paying jobs within the energy sector could be had without a high school diploma. Therefore, the region has not developed the cultural ***appreciation of education***. However, with the advances of technology, the higher paying jobs require some level of post-secondary education or training.

Likewise, ***infrastructure, including transportation, public utilities and broadband***, has not kept up with the pace of regional economic growth. As a result, longer commutes and limited rural public transportation options constrain employment and educational options for residents. Access to broadband, education and workforce training is hindered by infrastructure challenges. Educational attainment outcomes are uneven along racial, economic and cultural lines. Limited broadband access in rural areas not only impacts educational attainment, it reduces the ability of these areas to attract economic development.

Regional competition is a challenge. Collaboration within and across regions would support major projects.

In addition, the improvement of the region's water quality and the protection and preservation of it's ***coastline and wetlands*** is paramount to economic resiliency of the region. At a more global level, the Bayou-River Region has been associated with the negative perceptions related to disasters - natural and man-made.

Opportunities

The Bayou-River Region is fortunate to have numerous stakeholders involved in promoting economic development throughout the region. There is already strong collaboration at work among these local and regional actors, but the opportunity always exists to strengthen coordination and ***harmonize development efforts*** across the region. Greater information sharing and complementary initiatives (e.g., surveys, data sharing, and coordination of local planning documents with regional goals and objectives) are examples of such coordination and collaboration.

The region can also become more economically resilient by working to develop and ***diversify the industry clusters*** adjacent to its existing strengths. The existing and developing industry clusters in the region also would benefit from the further development of middle-skills labor in the region. A greater focus and more resources toward developing and credentialing middle-skill employees would enhance economic development in the region.

There is an opportunity to overcome the negative perceptions about the region by ***developing regional and national brand appeal*** messages highlighting the value of the Bayou-River Region to the country and the world.

Threats

The growth in the region also poses a potential threat in the form of resource constraints. The fragile condition of the coastline and wetlands impact the ***cost of economic development*** in the region. The FEMA Flood Elevation Maps, ***Biggert-Waters***, the ***cost of wetlands mitigation***, and the increased cost in flood and property insurance directly impact economic development within the region. In addition, the threat to undo the 2006 Gulf of Mexico Energy Security Act (GOMESA) threatens Louisiana and the region's ability to protect its coast and wetlands.

The ***dominance of a small number of industry clusters*** in the Bayou-River Region economy also poses a threat. Continued diversification of high-value-added industries in the region will enhance the overall economic resilience of the Bayou-River Region

Regional migration patterns pose a distinct challenge, as many residents have moved to communities where housing and insurance costs are affordable. This population shift places a burden on government officials and developers to manage the growth of the region. The Bayou-River Region does not have **cohesive land-use plans**. This impacts the growth of the region and makes it difficult to create a distinct sense of place that embraces the history and culture of the region and at the same time welcomes change and growth. Attracting new businesses to the region is essential, but it must be complemented by efforts to grow existing local businesses and develop local community engagement, or risk losing some of the distinct look and feel that marks so many different Bayou-River Region communities.

STRATEGIC DIRECTION & ACTION PLAN

In light of the region's strengths and weaknesses, as well as the opportunities and threats it faces, the South Central Planning and Development Commission Economic Development District proposes the following Strategic Direction and Action Plan for the region. The Direction is laid out as a series of development themes, and an Action Plan for SCPDC's role in the implementation of the Strategic Direction follows.

THEME 1: WORKFORCE DEVELOPMENT

GROW TALENTED AND INNOVATIVE PEOPLE

ADVANCE PRODUCTIVITY AND ECONOMIC COMPETITIVENESS

The vitality of the region is predicated upon the skills and productivity of its workforce. Therefore, continued growth in the region requires an expansion of employment opportunities and the creation of more pathways for advancement for all Bayou-River Region residents. Efforts to develop a skilled workforce throughout the region and across the entire wage spectrum will be a core contribution to the region's ongoing economic competitiveness. Workforce needs vary widely across the region, particularly along rural and urban lines, but key priorities for the entire region do exist. Specifically, important strategic directions in regional workforce development include the following:

- Identifying and addressing gaps in educational support to match students to appropriate programs and improve educational attainment outcomes, with a particular focus on increasing attainment in fields aligned with employment needs throughout the region;
- Increasing the capacity of programs that credential students for career skills at the secondary and post-secondary level, and support educational institutions in the implementation of curriculum driven in part by employment opportunities and retraining of displaced workers;
- Coordinating between educational institutions and the private sector to align post-secondary program offerings and expand accessibility of programs oriented toward meeting labor needs at the local and regional level; and
- Supporting the sharing and distribution of labor market and career knowledge to inform Bayou-River Region residents as they make decisions related to their own skills development and workforce competitiveness.

THEME 2: ECONOMIC DYNAMICS

ENTREPRENEURSHIP, INNOVATION & GROWTH ACCELERATION

IDENTIFY, MARKET AND BUILD UPON THE REGIONS UNIQUE ADVANTAGES

With a strong entrepreneurial spirit and inventive and resilient capabilities in the region's businesses and universities, the Bayou-River Region is a well-positioned launch point for entrepreneurs looking to compete in the global innovation economy. Support for inventors' ideas to transition into patents and the marketing of new products is a part of the region's culture often referred to "Cajun Engineering". Likewise, facilitating the growth of the region's existing businesses is critical to retaining the pillars of the local ecosystem. The Bayou-River Region must be a region where businesses are constantly being started and being re-invented to remain economically competitive. Specific objectives for supporting entrepreneurship and accelerating growth among the region's existing firms include the following:

- Improving the awareness, accessibility and scale of programs in the region that support and encourage prospective entrepreneurs and inventors to start and grow businesses;
- Fostering collaborative working spaces where ideas can be developed, patented, and commercialized, allowing innovative businesses to grow;
- Supporting the development of place-specific and innovation-based opportunities/industry clusters throughout the region that create desirable jobs;
- Creating an open dialogue with public and private stakeholders in order to identify and alleviate growth constraints for existing businesses; and
- Developing and growing businesses that export goods and services from the Bayou-River Region to broaden their potential customer base.

THEME 3: INFRASTRUCTURE

ENHANCE AND SUSTAIN A ROBUST INFRASTRUCTURE

STRENGTHEN THE PHYSICAL AND DIGITAL INFRASTRUCTURE TO ENSURE GLOBAL CONNECTIVITY INCLUDING BROADBAND, WATER AND TRANSPORTATION CORRIDORS

Resilience encompasses the notion that the Bayou-River Region must be prepared to respond, adjust, and recover from misfortune or change, including man-made, natural or economic disasters, through cohesive coordination. SCPDC is focused on developing the region's economic resilience, which includes working to reduce the region's vulnerabilities to economic shocks, enhancing the regional economy's ability to recover from a shock, and supporting innovation in the region so that industry clusters in the Bayou-River Region remain competitive as industries evolve. The region's economic resilience would be bolstered by the following:

- Employing a regional approach to resource and infrastructure development and management, namely coordination and collaboration for water planning and management, air quality emission, and accessibility of broadband, future power demands and transportation infrastructure capacity;
- Supporting coastal and flood protection measures to secure and protect infrastructure and development improving resiliency within the region;
- Increasing collaboration in state and regional transportation planning to ensure that critical transportation corridors are completed to accommodate ports and multi-modal transportation facilities; and
- Expanding and diversifying housing stock in areas near employment, potential transit centers and existing infrastructure.

THEME 4: COMMUNITY COMPETITIVENESS

PLACE BUILDING

CREATE AND REVITALIZE HEALTHY AND RESILIENT COMMUNITIES. FACILITATE LOCAL CAPACITY BUILDING WITHIN COMMUNITIES, ORGANIZATIONS, BUSINESS AND INDIVIDUALS

The Bayou-River Region is growing, and it is incumbent on those shaping that development to guide it in a sustainable, efficient, and distinct direction. Place-building encompasses the notion that local business, residents and developers can craft development scenarios that are both locally-driven and advantageous for future growth. The region can continue advancing this objective by the following:

- Protecting and conserving the region's natural resources and promoting more equitable use of these resources for business and recreation;
- Improving the fiscal capacity of local governments and the communities to make the Bayou-River Region financially attractive for economic development, enhancing quality of life and cultivating the region's overall capacity to make efficient land use decisions;
- Supporting efforts to develop and enhance transit systems within commuter communities to expand the educational and employment opportunities of the local workforce by increasing accessibility; and
- Coordinating the regional efforts to address and ensure the affordability of development costs within the coastal region, including reducing federal mitigation costs for government entities and insurance costs to business and residents, to support the economy, resiliency and growth of communities.

ACTION PLAN

The South Central Planning & Development Commission Economic Development District is fortunate to have a well-developed network of stakeholders who can contribute to the implementation of this CEDS. The SCPDC Administrative Board and the CEDS Committee are comprised of invested stakeholders and leaders from throughout the region's communities. This diversity of membership reflects the various perspectives and interests in the region, as well as supports SCPDC's collaborative approach in implementing the regional CEDS.

In the broadest sense, SCPDC will support the implementation of the CEDS by providing assistance to communities throughout the region, by providing data, information, and expertise. SCPDC will identify opportunities for catalyzing growth; and coordinating regional development efforts. SCPDC will continue to meet regularly in order to share and disseminate best practices in development, coordinate development activities, and align local strategies with the regional Comprehensive Economic Development Strategy. SCPDC will look for opportunities to partner with organizations outside of the Commission in order to effect positive developmental change that is aligned with the CEDS throughout the region. SCPDC will continue to engage the region in the CEDS process by utilizing digital media and providing access to information.

EVALUATION FRAMEWORK

Ultimately, a CEDS is only useful to the extent that it translates to positive developmental impacts in the region. Therefore, the following performance metrics are included as a vehicle for measuring the successful implementation of the CEDS and assessing that implementation's development impact. The performance metrics are driven by the themes described in the previous section. Therefore, that framework has been applied to present the CEDS' evaluation framework below.

METRIC	VALUE AT PRESENT	SOURCE
THEME 1: WORKFORCE DEVELOPMENT		
Increase in the number of vocational certificates awarded by the region's post-secondary institutions	In 2014, 5,059 vocational certificates were awarded by post-secondary institutions	National Center for Education Statistics, IPEDS
Increase in the share of population aged 25+ in all Bayou-River Region parishes with a post-secondary degree	As of 2014, 14.27% have a post-secondary degree	U.S. Census, American Fact Finder, American Community Survey
Increase in the share of households in all parishes in the Bayou-River Region earning an annual income more than $35,000	As of 2014, 64.5% of households earn more than $35,000 per year	U.S. Census, American Fact Finder, American Community Survey
Increase average hourly wages	Between $20 and $21 per hour	Bureau of Labor Statistics
THEME 2: ECONOMIC DYNAMICS		
Increase in the number of new firms created in the Bayou-River Region each year.	In 2013 – 2014, net loss of 11	U.S. Census, American Fact Finder, American Business Survey
Increase in the number and value of venture capital investments in the Bayou-River Region	In 2015, one (1) deal worth $9 million	National Venture Capital Association
Increase in the number of patents awarded to intellectual property owners in the Bayou-River Region	38 patents in 2013	U.S. Patent and Trademark Office
Increase in the number of jobs created through expansion of existing businesses	In 2014, 4,150 jobs were created by firms in the Bayou-River Region	U. S. Census, American Fact Finder, American Business Survey

METRIC	VALUE AT PRESENT	SOURCE
THEME 3: INFRASTRUCTURE		
Increase in the value of exports from the Bayou-River Region in each parish	$64.9 billion in 2013	South Louisiana Economic Council
Coordinate the development and implementation of a regional approach to infrastructure needs.	Currently each parish addresses individual infrastructure needs with little coordination of projects that benefit the region	Parish Government Budgets and Planning Studies/ Documents
Increase the diversity of housing stock in the region	71% of regional housing is classified as Single Family.	U. S. Census Bureau, American Fact Finder, American Community Survey
Increase support for coastal and flood protection to protect infrastructure and development, to improve economic resiliency and assist in developing Coastal Zone Plans in preparation for GOMESA funding opportunities	Currently 3 parishes (Lafourche,St. James, Terrebonne) have Coastal Zone Plans.	SCPDC and Parish Coastal Zone Offices
THEME 4: COMMUNITY COMPETITIVENESS		
Increase in number of communities using place-building scoring criteria in economic development incentives	Develop a survey to establish place-building criteria for future regional economic development	SCPDC and SLEC survey of local communities
Reduction of development cost related to insurance and mitigation costs impacted by hurricanes and legislation (FEMA Flood Maps, Biggert Waters Legislation)	Since hurricanes Katrina and Rita in 2005, the cost of insurance and effective wetlands mitigation has negatively impacted public and private development	
Reduction of share of workers in the Bayou-River Region area that drive to work alone	In 2014, 83% of those employed in the Bayou-River Region area drove alone to work	U.S. Census, American Fact Finder
Increase equitable use of the region's natural resources	The region is void of an Environmental Division to assist parishes with environmental issues related to development	SCPDC – Development of a Regional Environmental Office
Increase capacity of local governments to make efficient land-use decisions	Assist regional parishes and municipalities with developing future land use plans and/or zoning	SCPDC and SLEC survey of local communities

Annual progress on the CEDS performance metrics will be reported on the GPRA form submitted to EDA, as well as on the SCPDC website.

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- *Notes: American Community Survey (ACS) Data - While the 2010-2014 ACS data generally reflect the February 2013 Office of Management and Budget (OMB) definitions of metropolitan and micropolitan statistical areas; in certain instances the names, codes, and boundaries of the principal cities shown in ACS tables may differ from the OMB definitions due to differences in the effective dates of the geographic entities. Estimates of urban and rural population, housing units, and characteristics reflect boundaries of urban areas defined based on Census 2010 data. As a result, data for urban and rural areas from the ACS do not necessarily reflect the results of ongoing urbanization. Sample size and data quality measures can be found on the ACS website in the Methodology section*

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Acknowledgements

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