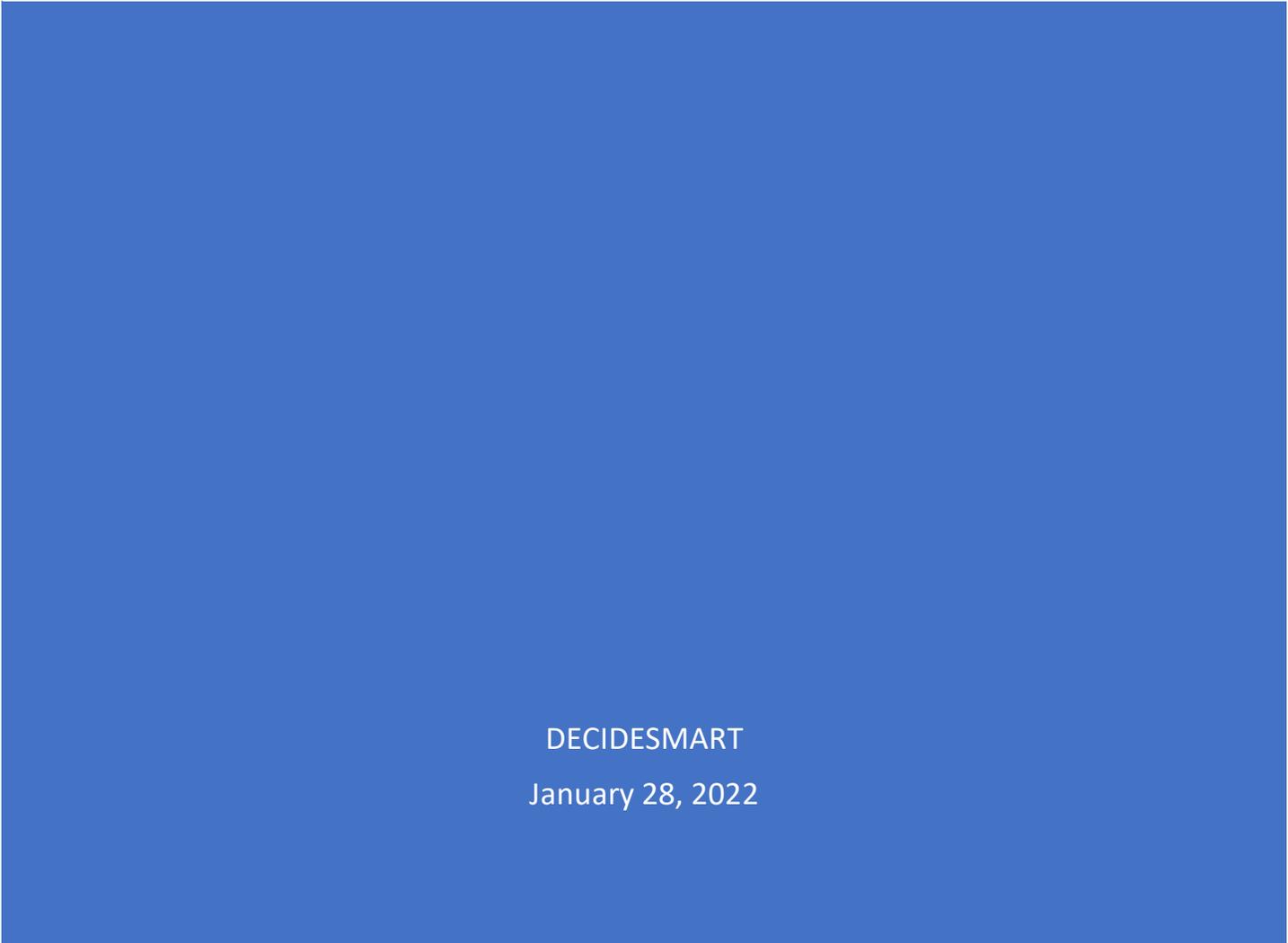




RESILIENCE AND RECOVERY:

A REPORT TO THE CRATER PLANNING DISTRICT COMMISSION



DECIDESMART

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EXECUTIVE SUMMARY

CEDS PRIORITIES

The 2021 CEDS update provides the basic underpinning for this Resilience and Recovery Report. The CEDS is the detailed roadmap for regional cooperation and collaboration in the Crater District.

The five major priorities identified in the CEDS are: aligning workforce development with high growth sectors; expanding technology to make the region more attractive to firms seeking to relocate and to promoting tech talent; growing the small business base; improving infrastructure crucial to economic development efforts; and coordinating with GO Virginia on cluster scale-up, workforce and entrepreneurial programs.

This Resilience and Recovery Report focuses on how the pandemic has impacted the challenges, opportunities and priorities articulated in the CEDS.

EMPLOYMENT AND WAGES, 2016-2021

Data produced by Chmura Economics and Analytics noted that in the four years preceding the pandemic total employment remained steady in the Crater District, declining by .3% with a higher decline in three key priority sectors, information technology (-7.8%), bioscience (-4.9%) and logistics (-4.4%).

Manufacturing held constant, declining by only .2%.

Between the end of 2019 and the end of the first quarter of 2021, overall job loss in the region accelerated and there was a 6.3% decline total employment. 6.3% of manufacturing jobs were lost, 7.4% of information technology jobs were lost, and 8% of jobs in bioscience. Logistics was the one major exception to the trend, where employment increased by 1.7% during the first year of the pandemic.

From the beginning of 2016 to the end of 2019, the total average increase in wages for all industries was 8.1%. Yet in the 15 months from the end of 2019 through 2021Q1, wages in all industries increased by 9% as employers responded to labor supply shortages. In the region's targeted industries, these increases ranged from 2.2% in manufacturing, to 7.5% in information technology, to 8% in bioscience, up to 19% in logistics.

PERSPECTIVES OF CRATER DISTRICT STAKEHOLDERS

Crater District stakeholders noted that the pandemic had significant impacts on their localities and the region. Main Street businesses and hospitality, leisure, and tourism related enterprises were hit extremely hard. Local government revenues from these businesses declined though jurisdictions with big box stores and major retail chains were not as negatively impacted. Rural jurisdictions without good broadband coverage were penalized both economically and educationally. Local officials also noted how new challenges continually arose on a regular basis.

Crater District stakeholders felt businesses and local government have exhibited resilience throughout the pandemic. Community organizations and nonprofits stepped up to help whenever possible. Managers communicated with one another and worked cooperatively to share information about solutions and sources of support. And jurisdictions that had significant broadband coverage were able to streamline processes, drive services to the internet and obtain robust citizen participation through streaming internet, responses that are likely to become permanent.

The leaders that were interviewed also noted that the pandemic highlighted the importance of addressing both the labor supply issues and the long-term infrastructure needs of the region. They believe that the Crater Planning District Commission has historically brought the community together to respond to challenges such as BRAC and that it is important for the Commission to do so in the current environment.

RESILIENCE AND RECOVERY

The pandemic has clearly intensified existing workforce challenges, accentuated the need for an effective resilience strategy for small business, and heightened the urgency of addressing infrastructure/utility issues that have hampered or delayed site development initiatives. At the same time, the pandemic has also brought forth unexpected opportunities that have an historically transformational potential for the region. Federal and state COVID response policies have provided funds for finally resolving the broadband coverage issues that have been a major obstacle to economic development. Global supply chain disruption and the impetus for reshoring manufacturing of critical necessities has led to the emergence of an advanced pharmaceutical manufacturing cluster that could become a national leader. Crater also has the potential for building upon recent growth and establishing the region as a major logistics hub.

12 RECOVERY STRATEGIES

The report concludes with twelve recommendations for capitalizing on the economic development opportunities that the pandemic has created while addressing its negative impacts and the long-standing challenges that have inhibited economic development in the region.

Recommendations include working to realize the potential of the pharmaceutical manufacturing cluster, creating a public-private Logistics Alliance to build upon the momentum in this cluster and continuing to partner with GO Virginia to address site development challenges, foster a regional entrepreneurialism strategy, and make final progress on Crater's two mega sites.

Recommendations also focus on developing solutions to the workforce challenges that have been exacerbated by the pandemic, including expanding the pipeline, upskilling initiatives, effective programs for attracting transitioning military, and placemaking initiatives to make Crater an even more attractive place to live and work. A final recommendation endorses a tourism plan for COVID recovery that includes the Fort Lee Museum Complex, Crater trails, and bikeways.

INTRODUCTION

The Crater Planning District's Comprehensive Economic Development Strategy (CEDS) provides the basic foundation for the Resilience and Recovery Report (R&R). Updated in June 2021, the CEDS outlines the demographic characteristics of the region, provides a detailed employment profile, identifies key industry clusters, establishes the principal economic development priorities for the Crater District, and lists specific projects that will strengthen the region's economic capacity.

This Resilience and Recovery Report is not intended to become a substitute CEDS. Instead, it examines how COVID-19 has impacted the region and what its effects mean for the main elements of the CEDS framework moving forward. The R&R report analyzes the economic changes that have emerged since COVID-19, how local governments and regional organizations are coordinating response and resilience activities, and the challenges and new opportunities that COVID-19 has brought to the region.

COVID-19 has brought significant distress to industries such as leisure, hospitality, and tourism and to local Main Street businesses. It has also heightened and exacerbated the long-standing workforce challenges for the region. At the same time, the inter-regional coalition that has been formed to support the emergent advanced pharmaceutical manufacturing cluster, the increased emphasis on logistics as a result of global supply chain disruption, and new state and federal resources dedicated to broadband coverage has the potential to be transformative for the region.

This Resilience and Recovery report is organized into five main sections.

Section One outlines the basic elements of the CEDS framework, briefly describing the region's principal assets, its economic development priorities, the main barriers to realizing these priorities, and the most impactful projects contained in the 2021 CEDS.

Section Two utilizes data produced by Chmura Economics and Analytics to describe the key changes in employment and income within Crater's major industry clusters since the onset of COVID-19.

Section Three summarizes the perspectives on COVID-19 recovery and resiliency voiced by business and local government leaders in the interviews conducted by DecideSmart.

Section Four examines the challenges that COVID-19 has posed to economic recovery in the region and the opportunities that have arisen or been accelerated by the pandemic. It describes how the labor supply/workforce development issues have become even more urgent and how site development

continues to be hampered by infrastructure challenges that are not always under the control of Crater localities. This section also details the opportunities for the region that COVID-19 has accelerated, notably the emergence of an advanced pharmaceutical manufacturing cluster that holds the potential for global leadership, the increasing significance of the region's logistics focus, the new capacity to address broadband coverage issues, and the partnership with GO Virginia on site and infrastructure issues.

Section 5 summarizes the twelve specific strategic recommendations that can promote resilience and recovery in terms of industry clusters, site/infrastructure enhancements, and workforce development initiatives.

CRATER CEDS ANALYSIS

The Crater Planning District Commission facilitates an ongoing economic development strategy process that engages the region's private and public sector stakeholders in producing a Comprehensive Economic Development Strategy (CEDS). The CEDS details the region's assets and major economic and demographic indicators. It also describes the Crater District's major opportunities and challenges and identifies priority projects. In short, the CEDS is a detailed roadmap for regional cooperation and collaboration in the Crater District. For this reason, it makes sense for this Resilience and Recovery Report to focus on how the pandemic has impacted the challenges, opportunities and priorities articulated in the CEDS. We begin with a brief summary of the regional assets, challenges and priorities noted in the most recent 2021 CEDS update.

REGIONAL ASSETS

Military Facilities:

Fort Lee represents approximately 10% of the region's economy, having doubled in size as a result of the 2005 BRAC actions and has become the Logistics Capital of the Army. Other military-related facilities providing job opportunities include the Defense Supply Center in Richmond and the newly operational U.S. Foreign Affairs Security Training Center at Fort Pickett in Dinwiddie.

Research and Development Centers

The Commonwealth Center for Advanced Manufacturing and the Commonwealth Center for Advanced Logistics Systems are both located in the region and represent unique collaborations between university-based researchers and private sector companies.

Access and Transportation Network

Two major interstates, I-95, and I-85, run through the middle of the Crater District while I-295 and Route 288 provide easy linkages to I-64. In addition, Routes 460, 58 and 10 are major east-west linkages to the Port of Virginia. The location of Crater District localities in this footprint provides the region with an enviable advantage in the competition for logistics sites.

Sites

The Crater District (along with the adjacent Richmond Planning District) is Site Central for Virginia, containing almost 30% of the available sites for large manufacturing and logistics operations in the

entire Commonwealth. Two mega sites, one in Greensville County and one in Sussex County are located in Crater and could provide significant opportunity to large employers. A recent GO Virginia grant will enable upgrading of more than a dozen sites to the Virginia Economic development Partnership's Tier 4 status, making it far easier to attract firms seeking to expand facilities or locate new ones.

CHALLENGES

The 2021 CEDS also outlined major challenges that continue to constrain the region's economic development capacities.

Fiscal Stress and Poverty

Three of the Crater District's jurisdictions rank in the top eight of Virginia's fiscally stressed localities, Emporia-1, Petersburg-5, and Hopewell-8. Four other localities- Sussex, Greensville, Colonial Heights, and Dinwiddie- are ranked as having above average levels of fiscal stress. The continuing level of fiscal stress is related to low revenue capacity per capita. Fiscal stress issues make it extremely difficult for localities to invest in facilities and infrastructure that might enable them to take advantage of the economic opportunities that could arise in the region. This is especially evident with site development where more affluent localities have found it far easier to aggregate parcels and upgrade them to business ready.

Infrastructure

Infrastructure has been at the core of economic development challenges for the Crater District. At the outset of the GO Virginia initiative in 2017, DecideSmart conducted interviews with leaders throughout the region. Natural gas supply and access and broadband issues were at the top of their concerns. At the beginning of this project, our interviews revealed that these concerns were still evident. Recent federal and state funding made available through the CARES Act and the American Rescue Plan should go a long way toward addressing broadband issues and remedying the coverage gaps. At the same time, natural gas access and water supply/wastewater treatment issues remain critical to future development.

Workforce

Population demographics in the Crater District continue to indicate workforce supply and training challenges in the region. The number of high school graduates has remained the same over the last six years. The relatively high poverty level and the region's relatively poor ranking in terms of health factors negatively impacts workforce availability. The region's higher education institutions, regional economic

organizations, CTE programs work diligently and creatively to address workforce challenges, but these remain an ongoing concern for economic development.

PRIORITIES

The 2021 CEDS specified five priority areas to guide future economic development effort.

Workforce

The CEDS recommended aligning workforce initiatives with four high growth sectors-Logistics, Advanced Manufacturing, Health Care, and Pharmaceutical. It called for extensive engagement with Richard Bland College, Brightpoint (formally John Tyler Community College), and Virginia State University, especially on the development of an Advanced Manufacturing Academy, the creation of a regional STEM initiative, and advancing certification and credentialing pathways.

Expanding Technology

The CEDS advocated support for further growth and expansion of both CCAM and CCALS in working with private sector companies and enhancing the region's appeal to firms making relocation decisions. It also recommended participation in the Commonwealth's Tech Talent Pipeline initiative as a means of increasing the number of tech proficient workers in the region.

Growing the Small Business Base

The CEDS recommended that businesses be encouraged to expand marketing opportunities through government contracting by utilizing the services of the Crater Procurement Technical Assistance Center, that the PDC would market and encourage the use of the EDA's Revolving Loan Program, that the PDC would continue to collaborate with and support the Crater Small Business Development Center of Longwood University, and that entrepreneurial programs would be developed to encourage transitioning military members to remain in the region.

Improving Infrastructure

The CEDS recommended a series of actions to facilitate the provision of public infrastructure that would be attractive to high-wage employers. These included steps to expand broadband, to complete mega sites in Greenville and Sussex, to seek funding for water and sewer infrastructure upgrades throughout the Crater District, to coordinate with VDOT to make improvements along 460 and Interstate interchanges, and to bring the Museum Enclave project with Fort Lee to fruition.

GO Virginia Coordination

The Crater District, along with the Richmond Region Planning District, comprise GO Virginia Region 4, one of the nine regions in the statewide initiative. Since its inception, GO Virginia has provided extensive support for workforce initiatives, cluster scale-up, entrepreneurial ecosystem enhancement and site development. The CEDS recommended that the Crater District continue to capitalize on the opportunities that the GO Virginia program offers for support of the Crater District's key priorities.

EMPLOYMENT AND WAGES: PRE-COVID AND POST-COVID

Employment

The Crater Planning District, GO Virginia Region 4, and DecideSmart have worked with Chmura Economics and Analytics to describe and analyze the basic economic conditions in the region for multiple years. Information about wages, income and cluster competitiveness is readily available. For the purposes of this Recovery and Resilience report, Chmura has been able to separate employment and income data for the years preceding COVID (2016-2019) and for the 2020-2021Q1 period following the emergence of COVID.

Between 2016 and 2019 (prior to the pandemic), employment in the Crater Planning District Commission region declined 0.3% to 74,702. In the traded-sector high-wage industries that are the focus of GO Virginia, several industry clusters experienced a larger decline in employment. The information technology and communication cluster experienced the largest decline (7.8%) followed by bioscience/life sciences (4.9%); logistics, warehousing, and distribution (4.4%) and manufacturing (.02%).

Employment in Crater PDC Region 2016-2019 (Four Quarter Moving Average)

	2016	2017	2018	2019	%	#
Manufacturing	7,055	7,124	7,137	7,037	-.02%	-18
Logistics	5,945	5,837	6,067	5,683	-4.4%	-262
IT/Communication	2,660	2,644	2,531	2,453	-7.8%	-207
Bioscience	9,167	8,949	8,729	8,717	4.9%	-450
All Industries	74,906	75,022	75,694	74,702	.3%	-204

Source: Chmura JOBS EQ

The challenge evidenced by the 2016-2019 data in Crater was that economic performance was better in private sector, lower wage industries and in government employment than it was in the higher wage, private sector clusters that provide a more stable foundation for long-term economic growth.

Initial employment data from the pandemic indicated that employment declined in all sectors. As of the first quarter of 2021, overall employment in the region is 69,916, down 6.3% since the start of the pandemic in 2020Q1. Manufacturing employment declined by the overall average of 6.3% during the pandemic, while the decline in the IT (7.4%) and Bioscience (8%) sectors exceeded the overall industry

average. Over the same period, logistics, warehousing, and distribution is the only targeted industry cluster that experienced growth, reaching employment of 5,784, a 1.7% increase during the pandemic.

Employment in Crater PDC Region 2019-2021Q1

	2019	2020	2021Q1	%	#
Manufacturing	7,037	6,717	6,591	-6.3%	-446
Logistics	5,683	5,683	5,784	1.7%	101
IT/Communication	2,453	2,315	2,271	-7.4%	-182
Bioscience	8,717	8,131	8,019	-8%	-698
All Industries	74,702	70,925	69,916	-6.3%	-4768

Source: Chmura JOBS EQ

The impact of COVID can be understood more granularly in the Crater region by looking at all industry employment for the 4 years preceding the pandemic (2016-2019) and in the first year of the pandemic (2020Q1-2021Q1) for each of the PDC localities.

Between 2016-2019, employment increased in three jurisdictions- Dinwiddie County (4.5%), Petersburg (1.3%) and Emporia (.44%). Total employment decreased in all other jurisdictions, ranging from .08% in Hopewell to 11.5% in Surry.

Since the pandemic began, however, total employment only increased in Dinwiddie County (.08%) while declining at least 3.3% in all other Crater jurisdictions. Total employment losses ranged from 3.3% in Greenville County to 8.2% in Emporia to 10.5% in Petersburg and 11.2% in Colonial Heights while declines in Prince George, Surry, Sussex, and Hopewell ranged from 4.9% to 5.9%.

All Industry Employment Trends in Crater PDC Jurisdictions

	All Industry 2016-2019	All Industries 2020Q1-2021Q1
Colonial Heights	-3.2%	-11.2%
Emporia	.44%	-8.2%
Hopewell	-.08%	-5.9%
Petersburg	1.3%	-10.5%
Dinwiddie County	4.5%	.8%
Greenville County	-2.8%	-3.3%

Prince George County	-0.19%	-4.9%
Surry County	-11.5%	-5.5%
Sussex County	-4.5%	-5.8%

Wages

While overall employment declined in the Crater region from 2016-2019, wages modestly increased. In the period between 2016 and 2019, annual average wages in the Crater PDC region rose 8.1% from \$41,261 to \$44,634. Among the GO Virginia targeted industry clusters, manufacturing wages had the largest increase in absolute dollars, moving from \$63,221 to \$69,803 with a 10.4% increase. Logistics wages increased from \$41,685 to \$46,134 with a 10.7% increase. Bioscience wages increased by 9.7% and IT/Communications wages by 3.2%.

Crater Planning District Wage Increases, 2016-2019.

	2016	2017	2018	2019	%
Manufacturing	\$63,221	\$64,725	\$68,051	\$69,803	10.4%
Logistics	\$41,685	\$42,320	\$43,086	\$46,134	10.7%
IT/Communication	\$52,247	\$50,535	\$50,340	\$53,906	3.2%
Bioscience	\$37,394	\$38,624	\$39,357	\$41,021	9.7%
All Industries	\$41,261	\$42,522	\$43,623	\$44,634	8.1%

Source: Chmura JOBS EQ

Since the pandemic began, the difficulty in finding workers have led employers to raise wages far more quickly than in the previous four years. Overall, wages in the Crater District increased by 9% since the end of 2019, a larger increase in fifteen months than in the previous three years. The increase was driven by explosive growth in Logistics wages, moving from \$46,134 average in 2019 to \$54,927 in 2021Q1, a 19% increase during this period. Wages in Information Technology and Bioscience increased by 7.5% and 8% respectively during this period. Manufacturing wages increased by 2.2%, though the average wage of \$71,340 was still by far the highest wage of the targeted clusters in the Crater District.

Crater Planning District Wage Increases, 2019-2021Q1

	2019	2020	2021Q1	%
Manufacturing	\$69,803	\$70,922	\$71,340	2.2%
Logistics	\$46,134	\$53,071	\$54,927	19%
IT/Communication	\$50,878	\$53,906	\$54,690	7.5%
Bioscience	\$41,021	\$43,445	\$44,285	8%
All Industries	\$44,634	\$47,662	\$48,665	9%

Wage increases in the Crater District localities showed a similar trend to the region-wide pattern. Four localities, Colonial Heights, Emporia, Hopewell, and Surry saw one year increases greater than the total percentage increase for the previous three years. Dinwiddie, Colonial Heights, and Sussex saw one-year wages increases of greater than 10%. There was not a single jurisdiction that did not see a percentage increase in wages from 2020Q1 to 2021Q1 than was greater than the average yearly wage increase in the previous three years.

Crater Planning District Locality Wage Increases, 2020Q1-2021Q1

	Wages 2016-2019	Wages 2020Q1-2021Q1
Colonial Heights	9.9%	10.6%
Emporia	7.3%	9.8%
Hopewell	5.1%	9.8%
Petersburg	7.1%	3.1%
Dinwiddie County	18.4%	12.9%
Greensville County	18.9%	7.6%
Prince George County	9.6%	6.8%
Surry County	.2%	2%
Sussex County	11.7%	10.4%

Source: Chmura JOBS EQ

PERSPECTIVES FROM CRATER DISTRICT STAKEHOLDERS

To complement the economic data produced by Chmura Economics and Analytics, the DecideSmart team conducted a set of interviews with CEDS committee members, PDC officials, local government managers and local elected officials, and key business leaders. The purposes of the effort were to obtain a more granular perspective on the impact of COVID 19 in the Crater Planning District Commission service area, to learn how local government officials and other PDC stakeholders were responding to the pandemic, and to gain their ideas about the role the PDC might play in COVID-19 recovery. The opinions and beliefs of stakeholders will have a significant impact on the choices the region makes in developing its pandemic response.

Interviews were conducted in the January-February 2021 timeframe when COVID-19 was having a major impact on business entities, public and private organizations, and citizens. Local governments were already feeling the full impacts on service needs within their respective localities. Innovative methods for dealing with these needs were already being introduced or at least being assessed. At the time of the interviews, federal and state COVID relief programs were beginning to be implemented, but the extent of the efforts were not fully visible, and the impacts of COVID relief were at a preliminary stage. In subsequent discussions with CEDS advisory committee members, we were able to learn how federal and state dollars flowing to localities were being employed.

COVID-19 Impacts

- **Unexpected and Unprecedented Challenges-** Stakeholders reported that while their communities had often prepared for natural disasters, mass shootings and other terrorist events, the pandemic continually brought forward new and unpredictable challenges. Local government officials noted that every day there was a “this had never happened before” event, that the public health rules and regulations were unclear at first and took time to evolve.
- **Loss of tax-generated revenues for local governments-** Administrators and elected officials in several localities reported that meals and lodging tax revenues were down.
- **Internet Coverage and Access-** Long-standing broadband issues in the region widened the digital divide between communities that had good coverage and those that did not. Lack of internet access aggravated the difficulty of responding to the pandemic, especially in education. Leaders in several communities reported that the lack of broadband access exacerbated the problems of remote learning for K-12 teachers and students when they did have easy access to the internet at home.

- **Main Street and Hospitality Businesses-** Although the extent of the impact did vary by locality, almost all stakeholders noted the stress that COVID-19 placed on small business, property owners that rented to small businesses, and tourism-related enterprises. While “big box” stores and retail chain groceries prospered, community-based businesses had a much dissimilar experience. In addition, hospitality, tourism, and leisure-related businesses in the Crater Region experienced the same devastation that was reported throughout Virginia and the nation. Reduction in travel harmed hotels near the interstates that catered to business or leisure travelers; restaurants that were able to remain staffed and open were compelled to turn to take-out-or delivery, frequently not compensating for the loss of in-person dining.

In some instances, pandemic-related rules penalized local business unfairly. National big box chains, for example, prospered from the attention that home maintenance and renovation received while local outlets that sold the same categories of goods were shut down during the early months of the pandemic.

In addition, there was concern expressed that expanded unemployment benefits for individuals could be hindering return to work decisions by individuals who had been employed in leisure and hospitality.

Local Resiliency Responses

- **Confidence in the Region’s Response-** The leaders we interviewed believed that the communities within Crater had been creative in responding to COVID-related challenges with an admirable level of adaptation. Many stories were told of how non-profits and other community organizations stepped up to help out whenever needed, such as clergy in rural areas who assisted in communicating with citizens who did not have internet access.
- **Managers Communicated and Worked Cooperatively-** The pandemic actually increased collaboration and cooperation among area governmental executives. Managers reported learning from one another and adopting or modifying strategies that appeared to work in one community for their own citizens.
- **Enhanced Use of Technology-** In the Crater communities that did have extensive broadband coverage and wide access, COVID prompted local governments and businesses to bring more services online, frequently instituting changes that are likely to become permanent. Local governments partnered with banks on tax collection efforts. Business processes were streamlined, online fees were waived, video explanations were put online, providing citizens with clear

instructions for accessing services. Local governments engaged citizens through the internet more frequently, often finding that public participation was equally if not more robust than traditional in-person forums. Leaders believed many of these changes enabled them to be more efficient, enabled better communication between citizens and their government.

Businesses in the region adapted by allowing employees to telecommute and customers to utilize online services, by exploring direct delivery to residential customers, and offering more curbside and take-out services to substitute for in-person shopping and dining.

- Use of Federal and State Dollars: The cooperation that occurred among managers also helped to shape the utilization of federal and state COVID relief dollars. They spoke regularly about the regulations governing the use of funds and their priorities for deploying relief funds. Several localities worked together, for example, with private sector providers in developing strategies to enhance broadband coverage and access.

COVID-19 and Longer-Term Challenges

For many stakeholders, COVID-19 reinforced their beliefs about the importance of addressing the long term issues crucial to the prosperity of the region, both those that had been identified in the CEDS and changes that the pandemic was catalyzing.

- Restoring Small Business and Entrepreneurialism- The damage done to Main Street businesses and leisure/hospitality/tourism by COVID-19 led stakeholders to suggest that the region needs a plan for reviving small businesses that will bring together the diverse services that are offered and can increase long-term resilience to the ongoing pandemic and to additional threats that could arise.
- Infrastructure- Stakeholders to whom we spoke reinforced the critical importance of the infrastructure issues that had been an obstacle to economic growth in the region. Broadband, water and sewer, and the role of regional utilities were mentioned by multiple interviewees. In addition, several respondents mentioned the Tobacco Commission as a potential source of support.
- Workforce: Multiple interviewees spoke about the long-term workforce issues facing the region. They suggested that specific programs that address supply and skill shortages are extremely important. At the same time, they also said that the region needs to address long-term pipeline issues that inform parents and middle school students about potential career pathways at an earlier age. Several interviewees also referred to “placemaking” issues, making the region’s communities even more attractive to potential workers as a place to live and raise a family.

- Voice of Business- Several stakeholders also noted that COVID highlighted the need for businesses in the Crater District to speak with a stronger and more unified voice. The CEDS had mentioned the formation of a regional chamber as a potential instrument for accomplishing this. It is not clear that there is uniform support among the CEDS advisory committee members for moving in this direction, but it is important that the goal of achieving a stronger business voice on regional issues not be set aside.

The Role of the PDC

- Stakeholder Perceptions: Local leaders perceive the Crater Planning District Commission (CPDC) to have been responsible for many successful regional efforts over an extended period of time. Its successful effort to bring together communities during BRAC is still seen today as a signal accomplishment that led to the establishment of the Army Logistics University at Fort Lee and the growth of its economic impact on the region.
The PDC was also important in highlighting and organizing tourism issues for the region, an activity evident today in its role in supporting the Fort Lee museum complex. As a result of the CPDC's effectiveness, leaders remain willing to bring ideas and issues to the PDC, an organization that has been a significant contributor to regional stability.
- The PDC as a Source of Expertise: The PDC is perceived to be a source of expertise for training, for process improvement, and for the complexities of intergovernmental issues that localities need to negotiate. In addition, the CEDS reports have been instrumental in keeping regional issue on the table such as workforce and infrastructure that remain crucial to economic progress in the next decades.
- The PDC Going Forward: Crater region leaders believe that the PDC should continue to serve important roles in the COVID-19 recovery period. It should continue to provide the array of services that it offers to member communities. But more importantly, several leaders want the PDC not to focus only on low hanging fruit, but to continue to be a catalyst for bringing difficult issues to the table regarding regional cooperation and infrastructure development that will shape the future of the member localities. The Crater PDC has historically been one of the more proactive PDC's in framing and not simply responding to regional challenges and it is evident that its stakeholders value this role.

RESILIENCE AND RECOVERY

The basic premise framing the resilience and recovery process is simple. The pandemic has clearly intensified existing workforce challenges, accentuated the need for an effective resilience strategy for small business, and heightened the urgency of addressing infrastructure/utility issues that have hampered or delayed site development initiatives. At the same time, the pandemic has also brought forth unexpected opportunities that have an historically transformational potential for the region. Federal and state COVID response policies have provided funds for finally resolving the broadband coverage issues that have been a major obstacle to economic development. Global supply chain disruption and the impetus for reshoring manufacturing of critical necessities have led to the emergence of an advanced pharmaceutical manufacturing cluster that could become a national leader. Crater also has the potential for building upon recent growth and establishing the region as a major logistics hub.

Workforce

Both the data and our interviews with Crater District leaders point to a growing perception that the workforce/talent situation in 2021 is fundamentally different from what has normally been evident in periods when economic conditions and external events result in significant job loss. We are accustomed to seeing far more people looking for jobs than available openings in the initial stages of an economic recovery. Today, however, employers, local government leaders, and economic development officials in the Crater region inevitably report that they cannot find enough workers for the jobs that are available. In recent years, employers have often spoken about the mismatch between the training of workers and the skills needed to perform their jobs. In 2021, however, employers and economic development officials report difficulties with simply finding an available supply of people interested in being employed. The workforce challenges in the region have been highlighted in numerous CEDS reports during the previous decade. But there is a sense among employers, economic development officials, and local government leaders that the situation has become even more urgent as available jobs go unfilled and turnover among employees is at historically elevated levels.

Initial responses frequently attributed the imbalance between available jobs and workers willing to perform these to expanded federal unemployment benefits and child tax care credits that made not working more financially beneficial than returning to the job. In our discussion with members of the CEDS advisory committee, it was noted that expanded unemployment benefits exceeded the salaries

that employees received from working in industry sectors that were especially hard hit such as hospitality and leisure.

But the expiration of federal unemployment benefits and the monthly child tax credit has not resulted in a rush to re-enter the workforce, at least to the same jobs that were left during the pandemic. A set of national research studies as well as discussions with economic development officials and employers in Region 4 indicate that multiple factors are at play. The Great Resignation has seen many older workers leave the workforce and not return. The difficulty of finding affordable childcare may have impacted return to work decisions made by families.

Data also indicate that self-employment has risen since the pandemic. The U.S. Labor Department reports that nationally there has been a 6% increase in the self-employed while total U.S. employment remains nearly 3% lower than before the pandemic. Yet many of the self-employed are not necessarily starting businesses but are cobbling together multiple contracting opportunities. In discussions with CEDS advisory committee members, it was noted that more individuals in the region appear to be combining a variety of gig economy jobs instead of seeking employment in a single venue.

Individuals may also be shifting away from low paid jobs to other opportunities than offer either higher pay or/and easier working conditions. Community colleges that serve the Crater region, for example, report lower enrollments in academic degrees, but significantly increased demand for certification programs that can lead to higher wages.

Businesses and economic development organizations in Crater have developed a remarkably wide range of responses to the shortage of workers. Higher wages, more flexible working conditions, and more extensive use of robots and other automation techniques have been commonly employed. Economic development officials in the Crater District told us that they are considering unprecedented measures such as approaching the jails/prisons to explore the possibility of using work release programs. They also mentioned that “placemaking” responses which make communities in their footprint more desirable places to reside are likely to be an essential feature of a longer term-response.

The bottom line is that in the post-pandemic work world the terms of engagement between employers and workers appear to have changed in ways that are influencing the willingness to perform certain jobs, the wages that need to be paid to attract them, and the balance between onsite and remote work. It is not absolutely clear how permanent these trends will be. Yet for a region where workforce

availability has been a major factor inhibiting the realization of economic development priorities, the intensification of worker supply issues is a concern of the highest level.

The development of a coordinated workforce strategy will be one of the important steps that the Crater District can take in promoting COVID recovery. Workforce and talent development Initiatives typically fall into four major categories:

- Pipeline Development- Programs intended to foster a continued supply of trained workers in a single industry or across industry sectors. The workforce pipeline is, however, quite long- it includes, at a minimum, middle school career pathways initiatives, efforts to educate parents about CTE programs in secondary school, apprentice programs, leaver and career switcher initiatives, stackable credential programs offered by the community colleges, degree programs from the associate level to the PhD in technical and scientific discipline.
- Addressing Targeted Shortages and Upskilling- Initiatives designed to address identified skill and occupational shortages that are either immediately evident or foreseeable in the near term. More recently, these programs also address the disincentives such as loss of a regular paycheck that have reduced interest in enrolling.
- Retention Programs- Initiatives designed to ensure that prospective or current workers remain in the region and seek careers and career advancement within it. These programs have typically focused on younger workers or college graduates who have been more likely to be willing to relocate for better opportunities or a more appealing social environment.
- Attraction Programs- Initiatives intended to attract workers to a region who do not presently reside in the area.

In our interviews with regional leaders and in discussions with members of the CEDS advisory committee, several individuals also suggested that “placemaking” initiatives should be included in the long-term strategies for workforce development. Placemaking is intended to capitalize on a region’s assets and potential by reimagining parks, recreational activities, downtowns, trails, and waterfronts to make and market it as an appealing place to work and live. Placemaking is not directly a workforce development strategy, but it is intended to address broader demographic trends that inhibit the overall labor supply for the Crater region.

INFRASTRUCTURE

The Crater Planning District’s CEDS has detailed the infrastructure issues that constrain economic development. The CEDS reports have typically focused on the challenge of broadband access; the

obstacles to site development caused by water/wastewater treatment issues; the difficulty of accessing natural gas and bringing power to sites in a timely manner; and interstate and highway exchanges built decades ago that are unable to handle the needs of contemporary manufacturing and logistics facilities. Federal and state responses to the pandemic will enable the Crater Region to make historic progress on resolving broadband coverage and access issues. This will be an enormous accomplishment. But the factors that inhibit site development and making the highest use of the region's assets are still significant obstacles that need to be overcome.

Broadband

Broadband is widely perceived to be a 21st Century utility. The lack of universal coverage and access in the Crater District was widely noted to be a multi-faceted obstacle. It made business recruitment more difficult. Even when broadband could be brought to business locations, it still inhibited the attractiveness of relocation to the area if businesses felt that employees would not have access in their residences. It was a significant barrier to educators who felt that students without access were at a disadvantage in comparison to their peers in more affluent localities. This situation was exacerbated during COVID when many localities were compelled to move K-12 classes into a full-time virtual mode.

The federal and state policies developed in response to COVID are enabling Crater District localities to address broadband challenges more expeditiously than at any time in the previous two decades. The availability of federal and state funds are being used by localities to partner with providers in a manner that should enable universal coverage to be a reality in the region within a few years, removing a significant barrier to business recruitment and educational access. It will be important for the Crater region not only to proceed with a successful implementation of broadband coverage, but to develop a plan for how the improved condition can shape new educational opportunities, regional economic development initiatives and out-of-region marketing. Coverage may not necessarily lead to universal access due to cost considerations for individuals and families, but it is a major first step from which the remaining access issues can be addressed.

Site Development

The Virginia Economic Development Partnership (VEDP) identified ready-to-go workforce programs and the lack of business-ready sites as critical obstacles to the Commonwealth becoming even more competitive in attracting companies seeking to relocate. This is especially the case in the manufacturing and logistic industries that require large sites.

Go Virginia has worked collaboratively with VEDP to increase the number of business-ready sites. VEDP commissioned a major study 2019-2020 that analyzed all sites in Virginia, assigned a tier status to each site, and estimated the dollar amount necessary to bring the site to business-ready status. Go Virginia Region 4 complemented the VEDP study with a “Strategic Sites Report” noting that 28% of the available sites listed in the VEDP study were within the footprint of the Richmond Regional and Crater Planning districts.

Region 4’s allocation of award dollars has placed a significant priority on site development. Thirty-four percent (\$4,047,907) of its total project funding (\$11,876,368) has been allocated to site development. The Crater District has benefitted significantly from these awards.

- The MAMaC Mega Site project received \$2,217,500 to advance the 1600-acre mega-site to Tier 4 by completing engineering plans to upgrade the Greensville County Water and Sewer Authority’s Water Treatment Plant, constructing the gravity fed sewer system to the site and a wetlands mitigation bank necessary to accommodate future development.
- The Virginia Gateway Region’s Site Readiness project was awarded \$100,00 to evaluate a portfolio of eighty-nine sites and to develop a plan for advancing selected sites to Tier 4 status with specific cost estimates included. The project was grounded in the premise that the region contained a set of attractive sites with excellent locations that could be upgraded with limited investments.
- As a follow-up to the study, The VGR Sites project received \$1,634,407 to elevate fifteen sites totaling 1,652 acres to Tier 4 by completing all due diligence work associated with the sites.
- The Sussex County Water Study was awarded \$96,000 to develop a plan for addressing the water supply issues that are limiting the marketability of the site. The Sussex site is officially categorized as a mega-site but has experienced difficulty in attracting potential end users because of water capacity issues.

The new gubernatorial administration not only continues to support GO Virginia but has proposed increased funding for the Virginia Ready-Sites Program and emphasized its commitment to upgrading and marketing mega-sites. The prospect for the Crater District to continue the progress that has recently been made on supporting its site development effort appears to be very promising. Yet there are also significant hurdles remain to realizing the full economic potential of site development progress.

Utility Access and Power

Infrastructure issues with utilities remain a significant barrier to site upgrading in the Crater region. This challenge of bringing power to a site prior to the time that a customer is in place has been highlighted by the Crater PDC several times in CEDS documents in recent years. GO Virginia Region 4's most recent Growth and Diversification Plan update has also focused on this obstacle. In some instances, utilities may be reluctant to install the appropriate lines until they are aware of specific customer needs. And, in other instances, there may be statutory barriers that prevent frontloading of sites. The Crater PDC and the Gateway Region should participate in the GO Virginia effort to develop a long-term solution to the challenge.

Water and wastewater treatment issues remain significant obstacles to economic development in the region. The South-Central Wastewater Authority, a regional plant in Petersburg that serves Colonial Heights, Petersburg and portions of Dinwiddie and Prince George Counties, has localities that are "bumping" up against their allocations for treatment capacities. In addition, wastewater issues are especially critical in the Poor Creek Service Area where new manufacturing and pharmaceutical facilities are emerging. Improving the water and sewer infrastructure will be critical to increasing reliability and capacity for current manufacturing sites and future growth.

Transportation

While the region's interstates and highways are a major economic asset, improvements are required to make the best possible use of the transportation network for economic development. Interchange improvements along I-85/I-95 and other locations in the corridor adjacent to attractive sites for manufacturing and logistics facilities will be crucial to obtaining the highest and best use of the assets. Obtaining the requisite state funding for these projects has been a challenge to the extent that "congestion criteria" have often been scored more highly in the statewide competition for transportation dollars.

OPPORTUNITIES

While the pandemic has exacerbated the region's workforce challenges and spotlighted the continuing need to address infrastructure issues, it has also resulted in new opportunities for enhancing the industry sectors that the Crater District has prioritized in its economic development strategy. Advanced manufacturing, especially in pharmaceuticals and logistics are likely to benefit from the changes brought about by the pandemic, accelerating the potential for substantial progress in the Crater District.

Advanced Pharmaceutical Manufacturing

The potential for an advanced pharmaceutical manufacturing cluster in the Richmond-Petersburg region have become a reality in the past few years through a striking series of developments. In 2020, the federal government launched a major initiative to address the problems associated with the outsourcing of pharmaceutical manufacturing to secure the nation's supply of essential medicines. The U.S. Department of Health and Human Services announced an historic effort to secure the supply of essential medicines in the U.S. The U.S. Biomedical Advanced Research and Development Authority (BARDA) awarded a contract to Richmond based Phlow Corp. to lead a multiyear effort with its partners to: (i) create and supply a national Strategic API Reserve (SAPIR) for essential medicines at risk of shortage, including medicines required for response to the global pandemic; (ii) create the capability to manufacture API using innovative continuous process advanced manufacturing technologies; (iii) provide a direct supply of essential medicines at risk of shortage to the nation's hospitals; and (iv) ultimately, manufacture essential medications end-to-end, from key starting materials (KSMs) to finished formulations with advanced pharmaceutical manufacturing methods.

The contract included a four-year base award of \$354 million and \$458 million more in potential options long term for a total value of \$812 million. To accomplish the work of the contract, AMPAC Fine Chemicals, a leading U.S.-based custom manufacturer of API, drug substances and registered intermediaries, has launched a major expansion of its manufacturing facilities in Petersburg. Phlow has initiated planning and construction of scale up and manufacturing facilities adjacent to AMPAC Fine Chemicals. In collaboration, Phlow and AMPAC will produce API used in the manufacture of essential medicines, incorporating M4ALL breakthrough chemistry and technologies. Moreover, Civica Rx, an innovative consortium of the nation's leading hospitals, is building a manufacturing facility adjacent to AMPAC and Phlow where it will use API manufactured on site by Phlow and AMPAC to produce finished formulations of essential medicines at risk of shortage and distribute them directly to the nation's major hospitals systems. Together, this manufacturing complex will be the nation's most advanced dedicated to the manufacture of API for essential medicines and incorporating continuous flow process API advanced manufacturing.

The required technical and production talent is well within reach, given the time until startup of operations of the core cluster companies and the responsiveness and skills of local community colleges

and industry collaboratives which already are at work creating solutions. VEDP's Virginia's Talent Accelerator program, in close collaboration with the community colleges, is working closely with AMPAC and Civica Rx to provide tailored workforce training for immediate needs. CCWA is working with AMPAC and Civica Rx to research, plan and build an appropriate onboarding workforce training program for the industry in the region. This can be built on core capacities at JTCC, shaped to the needs of the core companies, and modeled in part on successful programs which have been identified in Virginia and North Carolina. This will establish ongoing programs to train production / MT-1 workers tailored to the industry. Separately, CCAM and higher ed collaborators are launching a comprehensive program built on a successful national model (FAME) to recruit and train workers for manufacturing maintenance and support. Both programs are being designed to qualify for the support of "G3" ("Get Skilled, Get a Job, Give Back) the Commonwealth's new workforce initiative set to become law July 1, 2021. G3 funding will enable the programs to be offered to students tuition-free and to employers cost-free. The FAME program has received support from GO Virginia, and the CCWA/JTCC specialized on-ramp certificate program should be a strong candidate for GO Virginia support as well.

The foundation for an advanced pharmaceutical manufacturing cluster in Richmond-Petersburg is strong. The combination of innovative university-based science, its validation by leading national and global health care organizations, the unique opportunity posed by the practical shortcomings of outsourcing the supply chain for essential medicines, and the formation of companies in the area to address the challenge is extraordinarily promising. The broader community has organized itself to realize the potential of the cluster. A Go Virginia grant that recommended the formation of a Pharmaceutical Manufacturing Alliance has been followed up with the establishment of a Pharmaceutical Manufacturing Accelerator that has brought together leaders from the Crater region with the Richmond Region. The Accelerator was awarded a first stage Build Back Better Regional Cluster grant from the U.S. Economic Development Administration and is the process of applying for a final stage award that could provide additional resources that will enable the cluster to advance in an even more expeditious time frame.

Logistics

The global supply chain disruption that continues to this day has focused renewed attention on logistics. It has undermined most of the underlying premises that have driven logistics decisions in recent decades. Tenets such as just-in-time inventory and reliance on international business partners without regard to potential political barriers can no longer be the foundation of effective business practices.

Rising nationalism, widespread shortages of necessary materials, and unpredictable shipping delays have catalyzed a fundamental rethinking of logistics strategy. Firms desire to be closer to customers and want to be more flexible and resilient in meeting the demand for goods and services.

The reshaping of logistics strategies should be a major benefit for the Crater region. In the last decade, major corporations have located within the region. The data presented in the first part of the report showed that employment increased in logistics while declining in all other major clusters during the pandemic. Crater's locational advantages along the interstate, its established relationship with the Port of Virginia, its potential for developing sites that are enviably located and its role as the home to the Commonwealth Center for Advanced Logistics Systems will continue attract companies that are reorienting their logistics practices. Crater should seek to take full advantage of this by coordinating the logistics cluster in a more organized and intentional manner.

12 STRATEGIES FOR COVID RECOVERY

The strategies outlined below for COVID recovery respond to the challenges and opportunities that have arisen during the pandemic but do so in a manner consistent with the emphases and long-term priorities evident in the Crater Planning District Commission's CEDS. The strategies build upon the Commission's historic role in addressing critical issues, promoting collaboration and being a trusted partner with local governments, regional economic development organizations, military installations, and private sector firms.

1. *Economic development, governmental and educational officials should work collaboratively to realize the transformative potential for the Crater Region of the advanced pharmaceutical manufacturing cluster.*

The emergence of an advanced pharmaceutical manufacturing cluster holds the potential for bringing transformational progress to the region. This Project presents a unique opportunity to bring pharmaceutical manufacturing back to the U.S and revitalize the Central Virginia economy. The regional coalition working on building the cluster and applying for a Build Back Better Regional Cluster Award from the U.S. Economic development Administration has demonstrated that it will support thousands of new jobs in the Petersburg area, catalyze historic collaboration among community colleges and other workforce providers to provide state-of-the-art training programs, and address long-standing infrastructure issues such as the Poor Creek Sewer Service area that is not only crucial for the cluster but for additional development in the area.

2. *The Crater region should take advantage of its unique locational assets and form a Logistics Alliance that brings together, logistics-based companies, leadership of the Army Logistics University at Fort Lee, regional and local economic development officials, and the Commonwealth Center for Advanced Logistics Systems to establish the region as a major logistics hub.*

Logistics jobs increased during the pandemic and wage increases that began before the pandemic only accelerated, both pre-pandemic and since the advent of the pandemic. At Fort Lee, the Army Logistics University is perceived to be the Harvard of military logistics. Crater should aspire to become a capital of logistics development, forming an alliance that brings together logistics companies, economic development officials, and the Commonwealth Center for Advanced Logistics Systems to support activities such as firm recruitment/expansion,

workforce development, and identification and integration of innovative technologies at the forefront of the logistics future.

- 3. The Crater Planning District Commission should monitor the progress of broadband coverage, work with communities in addressing challenges that arise during implementation period and develop a plan for utilizing the increased broadband coverage in economic development and placemaking initiatives.*

The expansion of broadband coverage in the Crater District will enhance the asset base and economic competitiveness of the region. While broadband is likely to be expanded locality-by-locality or by agreement between localities, the Crater Planning District can work with the Gateway Region and local economic development officials on a plan for how this new regional utility can be employed in educational offerings, workforce training programs, economic development and placemaking initiatives.

- 4. The Crater District should continue to collaborate with GO Virginia in working with Virginia's gas and power companies in creating better front-end approaches to solving utility issues that reduce the competitiveness of the region's sites*

The difficulty of bringing electrical power and natural gas to sites prior to the time that customers are fully committed has become a significant barrier to attracting companies seeking to relocate. This is a complicated issue that involves significant upfront costs to utilities, negotiating state regulations regarding allowable recoverable costs, and meeting the more stringent timelines that site selection consultants have recently adopted. Go Virginia Region 4 has begun to address these considerations with power company leaders and state officials. The Crater Planning District should continue to collaborate with the GO Virginia effort, emphasizing how important it is to achieving the Commonwealth's own economic development goals.

- 5. The Crater District should collaborate with GO Virginia and VEDP to take advantage of the new gubernatorial administration's focus on mega sites.*

The Crater District has two of a small number of mega sites in the Commonwealth -the Mid-Atlantic Advanced Manufacturing Center (MAMaC) in Greensville/Emporia and the Sussex Mega site in Sussex County. In recent years, GO Virginia has provided grant awards for upgrading MAMaC and undertaking a water study at Sussex. The Youngkin administration has noted that

mega sites will be a special focus of its economic development efforts. The Crater District should collaborate with GO Virginia and VEDP to position MAMaC and Sussex as advantageously as possible in the Commonwealth's upgrading and promotion of mega sites.

- 6. The Crater District should engage private sector partners in working with VDOT to elevate the priority Interstate exchange issues.*

There are several attractive sites in the Crater region where Interstate and highway exchanges built decades ago cannot support the needs of contemporary manufacturing or logistics facilities. Transportation projects rating systems that prioritize reducing congestion can make it difficult to obtain support for modernizing interchanges, The Crater District needs to enlist private sector firms and other partners to work with VDOT in making the case for supporting interchange projects on the basis of economic development, especially when these occur in communities that are fiscally stressed.

- 7. The Crater Planning District should collaborate with GO Virginia on its Regional Entrepreneurial Initiative*

Go Virginia Region 4 is establishing a regional entrepreneurial initiative that is intended to encompass the entire Go Virginia footprint and will include a focus on growing the small business ecosystem. The Crater Planning District Commission could facilitate cooperation between the region's the small business development centers and the Go Virginia initiative in addressing region-wide issue that could enable small businesses to access grow and become more resilient.

- 8. The Crater District should develop a strategy for expanding the workforce pipeline*

The pandemic has clearly exacerbated the workforce issues facing the region. Besides the specific programs outlined below, it will be important to develop a strategic focus on expanding the workforce pipeline, partnering with schools and career pathways and parent information initiatives, aligning businesses with CTE programs, and developing innovative means of linking students to potential career opportunities.

- 9. The Crater District should support and develop creative programs that address barriers to workforce skill development.*

One of the key issues in upskilling workers is that employees need to retain a paycheck and employers need to keep employees on the job and neither can often afford training programs that take individuals out of the workforce. The Crater District should support and work to expand the model of Central Virginia FAME program for manufacturing technicians that advances training while workers can maintain employment.

10. The Crater District should develop more effective and institutionalized workforce programs with transitioning military.

The economic impact of Fort Lee on the Crater Region continues to be highly significant. Maintaining federal support for the activities undertaken there remains absolutely vital. The Crater District should also work to enhance workforce opportunities with transitioning military. Individuals with military experience are highly sought after by employers and an effective program for transitioning military can be a genuine competitive advantage for the region in attracting companies seeking to relocate.

11. The Crater District should consider the role that placemaking initiatives can play in complementing workforce development programs.

The intensification of workforce challenges have led economic development officials and other stakeholders in Crater to consider supplementing traditional programming to increase the labor supply in the region. Placemaking initiatives that take advantage of the outdoor resources such as trails and bikeways, recreational activities, and downtown revitalizations. In addition, as remote work becomes more prevalent, it may become possible to attract workers to regions that previously had been losing population.

12. The Crater District should continue to develop plans to assist tourism in the COVID recovery period.

The Crater Planning District was successful in obtaining bipartisan support for the Fort Lee Museum Enclave. The Enclave contains four museums, including the only military museum in the United States dedicated to telling the story of women in the military. If the General Assembly supports the request, it will result in significantly easing the entrance to the Fort Lee museums. Besides the enclave, planning for Crater trails, bikeways, and a general revival of

tourism in the region should be an essential feature of the recovery strategy and will be an essential feature of placemaking initiatives.