

# Embracing the Future in Southeast Missouri



A Comprehensive Economic Development Strategy  
Southeast Missouri Regional Planning and Economic  
Development Commission  
A Five-Year Strategy 2019 - 2023



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Comprehensive Economic Development Strategy Southeast Missouri Regional Planning and Economic Development Commission 2019 – 2023

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## Southeast Missouri Regional Planning and Economic Development Commission Board of Directors

Name	Company or Organization	Board Office
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John Singleton	Black River Electric Cooperative	Vice Chairman
Jay Wengert	Wengert Brother LLC	Treasurer
Garry Nelson	Ste. Genevieve County	Secretary
Jim Scaggs	Iron County	
Leo Arnzen	Bollinger County	
Robert Lourwood	Ironton	
Paul Hassler	Hope Church	
Earl Parker	Marble Hill	
Kelly Korokis	Fredericktown	
Keri McCrorey	East Missouri Action Agency	
Steve Williams	Minority Representative	
Scott Meyer	Cape Girardeau	
Greg Beavers	Farmington	
Kimberly Bauman	Mississippi Lime Company	

## *Embracing the Future* CEDS Strategy Committee

Contact Name	Company or Organization	Title
Troy Bollinger	Central R-III School District	Assistant Superintendent
Brent Buerck	City of Perryville	City Administrator
Kevin Cook	First State Community Bank	Commercial Loan Officer
Eva Dunn	Bollinger County Chamber, Museum and Library	President
Kim Ferguson	Bank of Missouri	Loan Officer
David Flieg	Flieg Equipment	Sales
Lance Green	Greens Garden	Owner
Chris Koehler	Koehler Engineering	Engineer
Kent Marler	New Era Bank	Loan Officer
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William Osborne	Southeast Missouri Transportation Service	Executive Director
Richard Proffer	University of Missouri Extension	Business and Industry Specialist
Van Robinson	Citizens Electric Corporation	CEO
Scott Sattler	Perry County Economic Development Authority	Executive Director
Dennis Vinson	Signature Packaging and Paper LLC	President & CEO
Mandi Brink	SEMO Port	Assistant Director
Roger McMillion	Mineral Area College	Dean of Career and Technical Education
Cindy Hente	Farmington Chamber of Commerce	Executive Director
Paul Koeper	Cape Girardeau County Commission	Associate Commissioner
Clint Tracy	Cape Girardeau County Commission	Presiding Commissioner
Anna Kleiner	City of Park Hills	Economic Developer
Brad Moll	New Bourbon Port Authority	Secretary
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Nathan McKie	Iron County Economic Partnership	Board Director
John Link	Jackson R-2 School District	Superintendent
Mark Baker	SEMO Central Labor Council	President
Shawn Oster	SEMO Central Labor Council	Field Representative
Larry Booth	Penuel Inc.	President
Tom Keim	Ste. Genevieve Industrial Development Corporation	CEO and Vice President

## Acknowledgements

We want to express our thanks to the *Embracing the Future Strategy* CEDS Committee who spent countless volunteer hours tapping into the pulse of the region. The Southeast Missouri Regional Planning and Economic Development Commission staff continues to do quality work for the region and is to be commended for leading the effort in both developing and implementing this strategy. Thank you to all the residents that reached out to share thoughts and concerns regarding the region and our future.

## Executive Summary

### ***Embracing the Future and Southeast Missouri Regional Planning and Economic Development Commission***

This Comprehensive Economic Development Strategy (CEDS) aims to build on the Southeast Missouri region's tremendous assets in order to make us even stronger, more resilient in the face of challenges and more equitable. This offers the opportunity for everyone to enjoy the quality of life our region is known for.

For decades, the Southeast Missouri Regional Planning and Economic Development Commission (SEMO RPC) has prepared the region's Comprehensive Economic Development Strategy (CEDS) as part of its Economic Development planning activities with the US Economic Development Administration. The 2019-2023 CEDS update has resulted in some important changes.

At the direction of the Economic Development Administration, we've revised this strategy in several ways. In the past, the CEDS placed a significant focus on data collection. Today, SEMO RPC is constantly collecting and analyzing data. That work does not occur within the confines of a single plan or report but is an ongoing effort. As a result, while we have reported some data that shows the region's condition at a point in time, we've made significant progress in transforming our data presentation from a static one to one that provides more information in a smaller package.

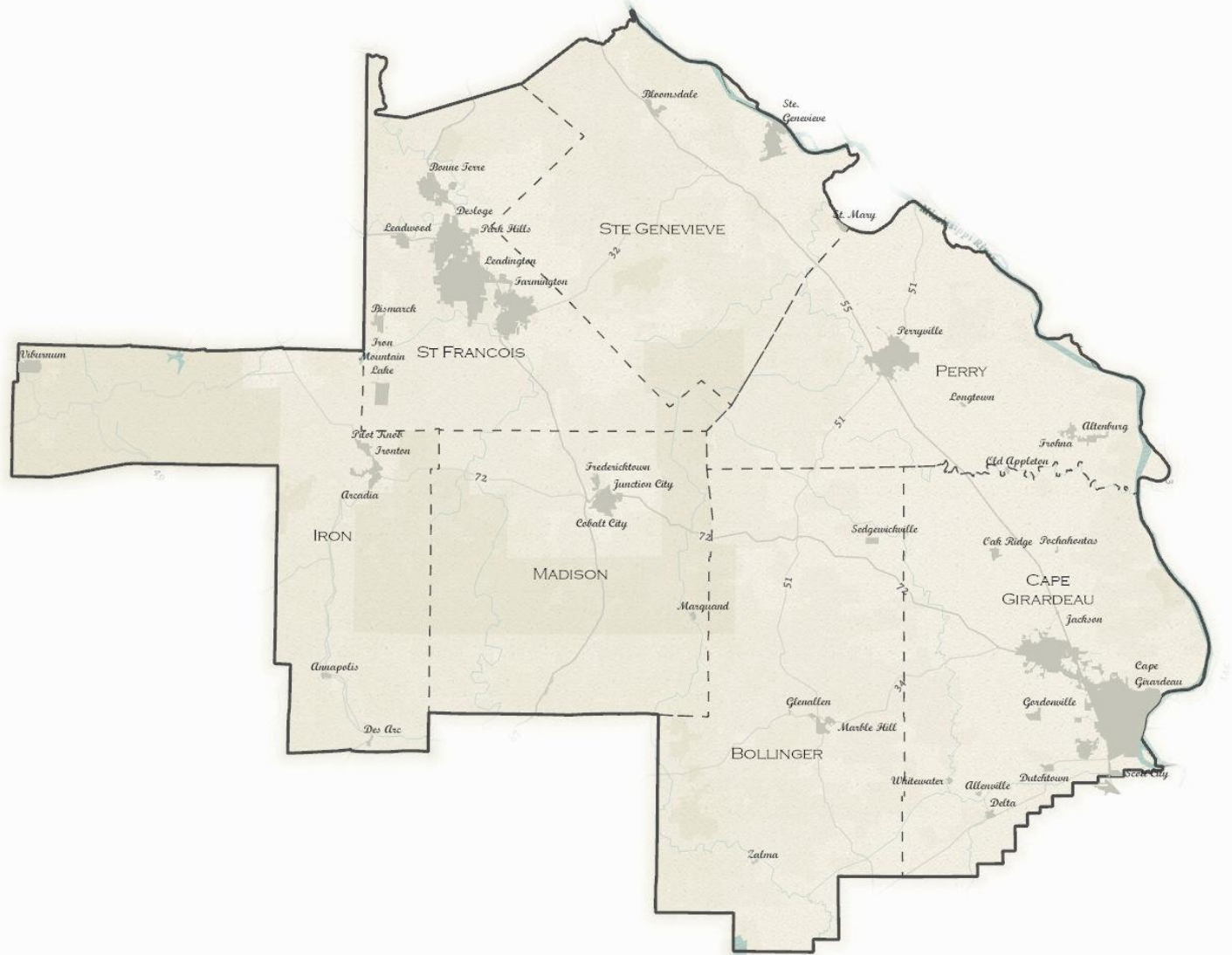
Moving forward, the CEDS will be a living strategy that is evaluated annually and updated as needed. While this current CEDS has been developed for a five-year period, we remain committed to utilizing feedback to fine-tune this strategy to ensure that our region is in the best position possible for continued economic growth and development.

Why do we plan?

Individual communities have many businesses and well-meaning organizations that focus on community improvements. Those communities work within their own organizations, and all foreseeable growth must happen from within the limits of their own capabilities. If an unexpected event or disaster occurs, members of an individual community are only capable of reaching into their own pot of resources to recover. This is reactive to changes in the economy rather than driving the change.

SEMO RPC is a group of private and public organizations which meet regularly to identify and observe all the regional resources that we offer collectively. While healthy competition drives our ambition for growth individually, we are all in this together as a region. Through collaboration, we can and will grow by providing our goods and services and by supporting initiatives that capitalize on our strengths. In the case of an unexpected event or disaster, the Southeast Missouri region is economically robust and is aware of federal, state, and local programs to absorb the shock and rebound with a new commitment to growth. This level of coordination only happens through strategic planning.

The Southeast Missouri Regional Planning and Economic Development Commission is the central agency monitoring the progress of *Embracing the Future* strategy while also implementing key aspects including business and workforce development initiatives and regional marketing. The CEDS document is important, not only because it guides the regional economic development strategies of SEMO RPC and partnering organizations, it can also provide access to funding opportunities through the U.S. Economic Development Agency (EDA). Strategies and projects included in *Embracing the Future* strategy are more likely to successfully receive EDA grants.





## What is a CEDS

A Comprehensive Economic Development Strategy is a region's playbook for engaging in the collaborative, region-wide transformation of the economy in order to implement a regional approach, facilitate workforce development, improve infrastructure, and enhance our quality of life. This strategy serves to refine and focus economic development efforts of all partners within the seven counties of Bollinger, Cape Girardeau, Iron, Madison, Perry, St. Francois, and Ste. Genevieve. The planning process brought communities together to set goals and prioritize actions to cooperatively drive economic progress for the region. This CEDS is divided into four sections with the major findings indicated below:

### Section 1: Summary Background

The summary background provides a clear picture of the local economic conditions by providing relevant data on demographics, natural resources, infrastructure, innovation assets and more. Slow population growth and an aging population continue to encourage regional leaders to invest in innovation and business startups in order to attract a talented and creative workforce. Housing remains affordable indicating a low cost of living, though there is a shortage in certain housing markets and home price ranges. Healthcare and Education continue to grow and offer a diversity of access and opportunity.

### Section 2: SWOT Analysis

The CEDS process requires a strategic investigation of the region's capabilities and capacity. The US EDA recommends a SWOT analysis to determine the Strengths, Weaknesses, Opportunities and Threats that speak to the region's unique assets and competitive positioning. The working groups completed a SWOT analysis. While completing the analyses, resilience to environmental and economic changes was a major component when considering aspirations and risks. Does, or could, that strength have a resilience component? What are the risks to not addressing resilience? The findings are summarized in a table of Strengths, Weaknesses, Opportunities and Threats (SWOT). Strengths include strong rural character and strong private sector support for large-scale community initiatives. From parks, memorials and healthcare, our region can accomplish great things. The regions characteristics of collaboration and main street capitalism community network combined with a culturally strong work ethic present unlimited opportunity for generating new products and services. The noted weaknesses were in connecting education and industry needs. A perceived threat is the State tourism policies with regards to rural budgets and staffing.

### Section 3: Strategy Direction/Action Plan

The strategic direction and action plan is summarized in a list of goals and objectives and is the heart of Embracing the Future strategy. This section answers the questions "where do we want to go?" and "how do we get there?" by using the information compiled in the SWOT.

### Section 4: Evaluation Framework

The evaluation framework gauges specific metrics (ex. average income, number of jobs, private investment) that will be analyzed on an annual basis to determine if goals are being met. The EDA requires SEMO RPC to submit an annual progress report to measure the successful implementation of the strategy. The evaluation process will focus not only on average income and number of jobs but also on education attainment and community net worth growth.



## Section 1:

### Southeast Missouri Region Summary Background

#### Location

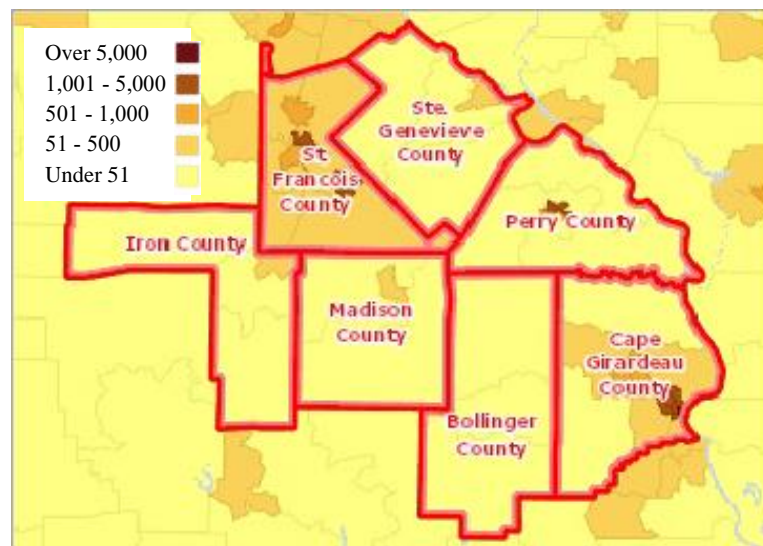
The Southeast Missouri region includes the seven counties of Bollinger, Cape Girardeau, Iron, Madison, Perry, St. Francois and Ste. Genevieve in Southeast Missouri. The region is bounded on the east by the Mississippi River, on the west by the Missouri Ozarks, on the north by the St. Louis metropolitan area, and on the south by the Missouri Bootheel. The region encompasses 3,675 square miles. The majority of the land is rural in character, with only 2.5% urbanized. Approximately half of the rural area of the region is forested. The U. S. Forest Services' Mark Twain National Forest covers over 158,326 acres of Iron, Madison, Ste. Genevieve and St. Francois Counties. Another 54,000 acres of the Region have been developed as state parks, state forests, natural areas and river access areas by the Missouri Departments of Conservation and Natural Resources. The climate of the Southeast Missouri Region may be described as humid continental with long summers and variable weather conditions.

#### Population

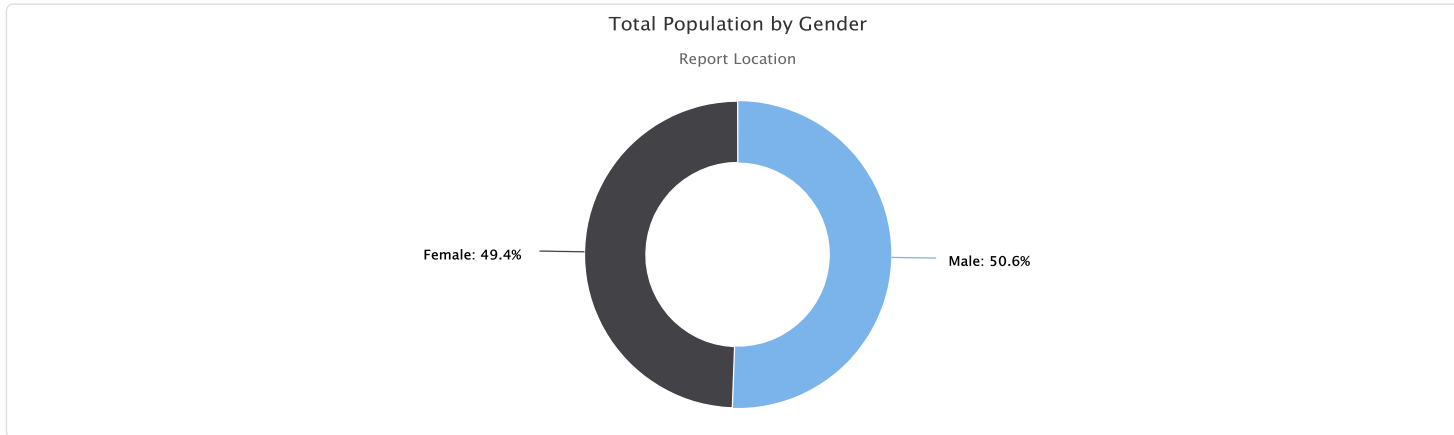
Population for the region has been on a slow increase since the last census with a total population of 217,017 as of December 2018, representing a 1.58% increase since the 2010 census. The population density for this area, estimated at 58.95 persons per square mile, is less than the national average population density of 90.88 persons per square mile.

Report Area	Total Population	Total Land Area (Square Miles)	Population Density (Per Square Mile)
Report Location	217,017	3,666.51	59
Bollinger County, MO	12,169	617.90	19
Cape Girardeau County, MO	78,753	578.53	134
Iron County, MO	10,177	550.26	18
Madison County, MO	12,188	494.39	24
Perry County, MO	19,150	474.36	40
Ste. Genevieve County, MO	17,888	499.15	35
St. Francois County, MO	66,692	451.91	146

StatsAmerica







### Total Population by Age Groups

Report Area	Age 0-4	Age 5-17	Age 18-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65+
Report Location	11,901	35,128	22,434	27,631	25,718	28,654	29,076	35,595
Bollinger County, MO	661	2,084	915	1,313	1,405	1,792	1,860	2,317
Cape Girardeau County, MO	4,472	12,251	11,204	9,836	8,772	9,457	9,797	12,224
Iron County, MO	494	1,637	768	1,022	1,190	1,402	1,643	2,130
Madison County, MO	692	2,089	895	1,597	1,387	1,634	1,712	2,220
Perry County, MO	1,127	3,470	1,510	2,211	2,284	2,602	2,686	3,245
Ste. Genevieve County, MO	874	3,092	1,353	1,888	2,027	2,569	2,868	3,211
St. Francois County, MO	3,581	10,505	5,789	9,764	8,653	9,198	8,510	10,248
Missouri	373,141	1,016,268	585,682	805,939	730,170	805,345	802,723	956,032
United States	19,853,515	53,747,764	31,131,484	44,044,173	40,656,419	43,091,143	40,747,520	47,732,389

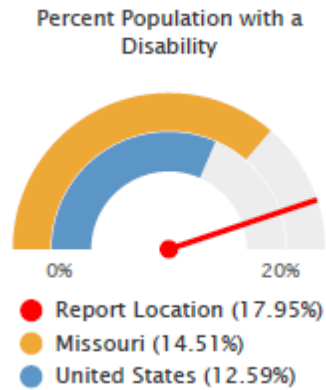
*Data Source: US Census Bureau, [American Community Survey](#). 2013-17. Source geography: Tract*

## Population with Any Disability

The region has a substantial portion of the population with a disability. The regional average is more than 3% over the state average and 5% over the national average. It is important to identify this portion of the population in order to make sure their needs are being met through employment, healthcare services, social services and transportation needs.

Report Area	Total Population (For Whom Disability Status Is Determined)	Total Population with a Disability	Percent Population with a Disability
Report Location	207,229	37,192	<b>17.95%</b>
Bollinger County, MO	12,262	2,792	22.77%
Cape Girardeau County, MO	76,859	10,524	13.69%
Iron County, MO	9,953	2,562	25.74%
Madison County, MO	12,042	2,855	23.71%
Perry County, MO	18,824	2,973	15.79%
Ste. Genevieve County, MO	17,676	2,665	15.08%
St. Francois County, MO	59,613	12,821	21.51%
Missouri	5,961,514	865,207	14.51%
United States	316,027,641	39,792,082	12.59%

*Data Source: US Census Bureau, American Community Survey, 2013-17. Source geography: Tract*

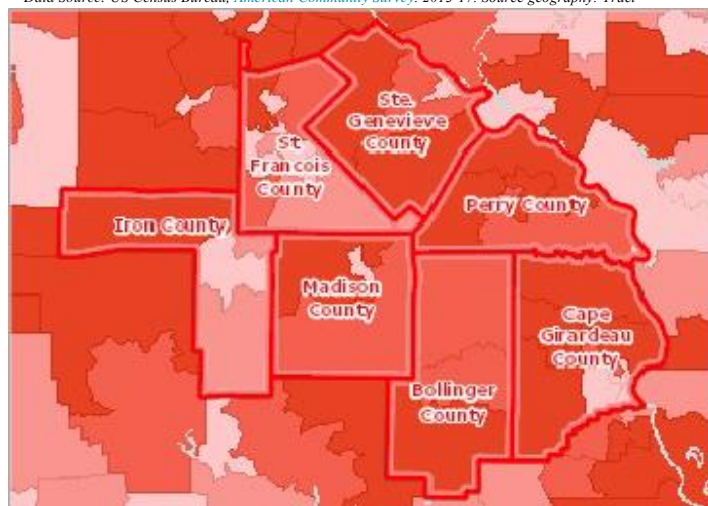


## Household Composition

According to the American Community Survey subject definitions, a family household is any housing unit in which the householder is living with one or more individuals related to him or her by birth, marriage, or adoption. A non-family household is any household occupied by the householder alone, or by the householder and one or more unrelated individuals. The region is at or above the state average in all but one county. This is indicative of the rural values and way of life across the region.

Report Area	Total Households	Family Households	Family Households, Percent	Non-Family Households	Non-Family Households, Percent
Report Location	82,722	54,512	65.9%	28,210	34.1%
Bollinger County, MO	4,805	3,424	71.26%	1,381	28.74%
Cape Girardeau County, MO	29,613	18,634	62.93%	10,979	37.07%
Iron County, MO	4,062	2,696	66.37%	1,366	33.63%
Madison County, MO	4,867	3,272	67.23%	1,595	32.77%
Perry County, MO	7,529	5,339	70.91%	2,190	29.09%
Ste. Genevieve County, MO	7,185	5,130	71.4%	2,055	28.6%
St. Francois County, MO	24,661	16,017	64.95%	8,644	35.05%
Missouri	2,386,203	1,537,957	64.45%	848,246	35.55%
United States	118,825,921	78,298,703	65.89%	40,527,218	34.11%

Data Source: US Census Bureau, American Community Survey, 2013-17. Source geography: Tract

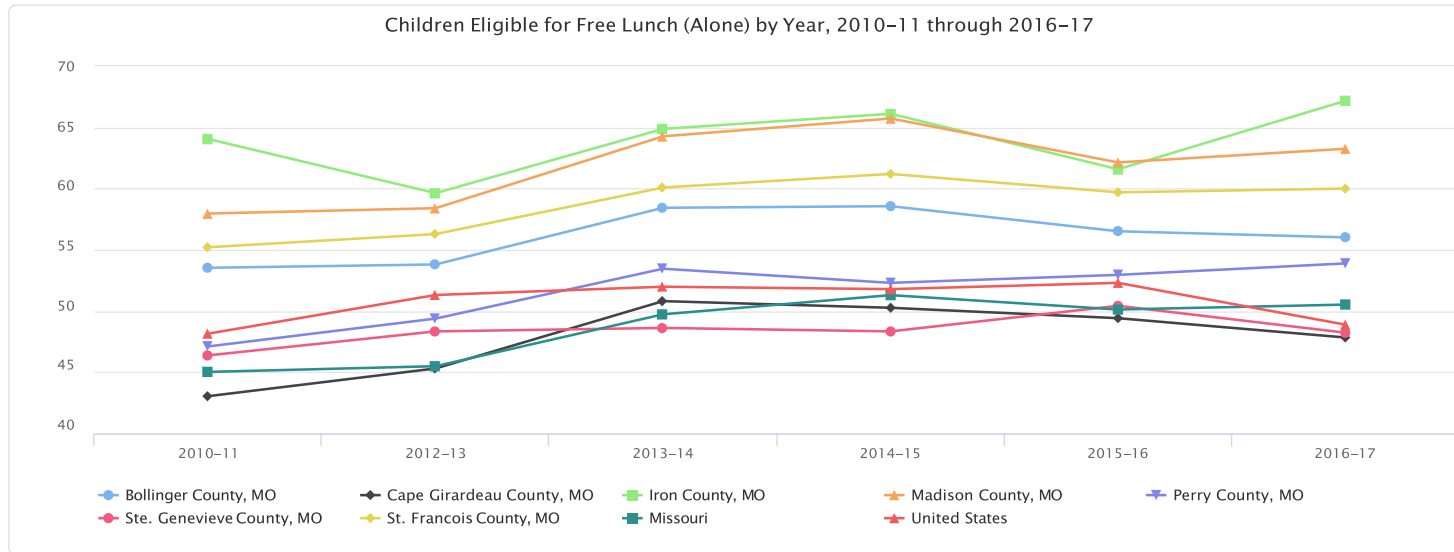


Family Households, Percent by Tract, ACS 2013-17

Over 72.0%  
68.1 - 72.0%  
65.1 - 68.0%  
Under 65.1%

## Children Eligible for Free/Reduced Price Lunch

Within the region, there are 17,208 public school students or 55.2% that are eligible for Free/Reduced Price lunch out of 31,176 total students enrolled. This factor can help identify vulnerable portions of the community, which may have less access to healthcare and other support tools.



Data Source: National Center for Education Statistics, [NCES - Common Core of Data](#). 2016-17. Source geography: Address

## Workforce

The region's labor force measured 103,059 with employment at 100,615 in 2018. Following several years of economic boom across the county, the region's unemployment rate is 2.4, which is nearly a percent below the national average. The highest unemployment rate in the region is 3.0%, which is still less than the national average. Retail trade in the region has steadily increased since 2010, showing a 6.2% increase in the number of individuals employed. The per capita income in 2018 was \$39,990, with the national average at \$54,446. Median income per household falls below the state and national averages, however, the cost of living in the region is lower than the state and national averages.

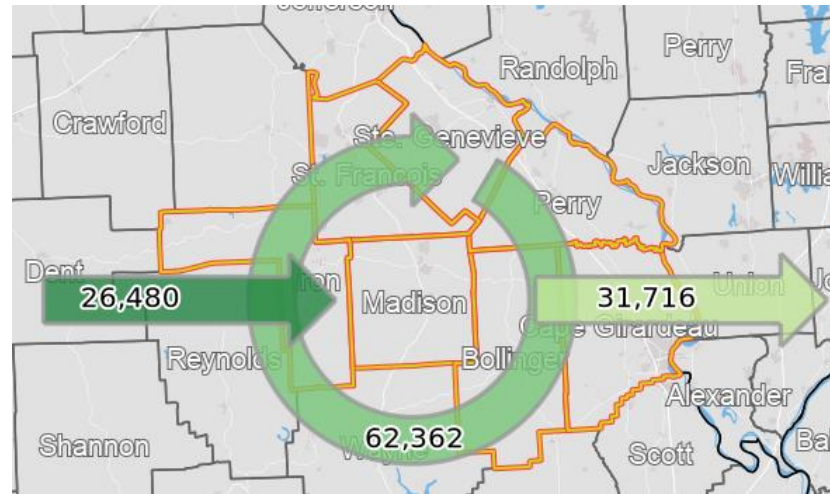
**Median Household Income by Household Size**

Report Area	1-Person Households	2-Person Households	3-Person Households	4-Person Households	5-Person Households	6-Person Households	7-or-More-Person Households
Report Location	\$21,208.00	\$51,369.00	\$57,231.00	\$65,988.00	\$65,266.00	No data	\$61,397.00
Bollinger County, MO	\$19,258.00	\$41,964.00	\$56,211.00	\$65,341.00	\$78,456.00	\$61,979.00	\$40,144.00
Cape Girardeau County, MO	\$25,276.00	\$57,139.00	\$67,976.00	\$70,201.00	\$62,375.00	\$73,606.00	\$82,708.00
Iron County, MO	\$17,608.00	\$44,873.00	\$38,523.00	\$55,893.00	\$60,833.00	\$61,848.00	\$36,964.00
Madison County, MO	\$16,638.00	\$46,250.00	\$50,645.00	\$59,432.00	\$51,795.00	No data	\$93,472.00
Perry County, MO	\$21,410.00	\$61,728.00	\$67,739.00	\$77,330.00	\$63,583.00	\$101,406.00	\$63,438.00
Ste. Genevieve County, MO	\$27,304.00	\$59,712.00	\$67,232.00	\$68,333.00	\$78,971.00	\$97,361.00	\$58,277.00
St. Francois County, MO	\$20,959.00	\$47,915.00	\$52,289.00	\$65,388.00	\$60,851.00	\$56,964.00	\$54,779.00
Missouri	\$27,077.00	\$58,438.00	\$67,636.00	\$78,881.00	\$75,584.00	\$72,957.00	\$70,217.00
United States	\$30,161.00	\$64,579.00	\$73,944.00	\$85,422.00	\$78,826.00	\$75,356.00	\$78,922.00

*Data Source: US Census Bureau, [American Community Survey](#). 2013-17. Source geography: Tract*

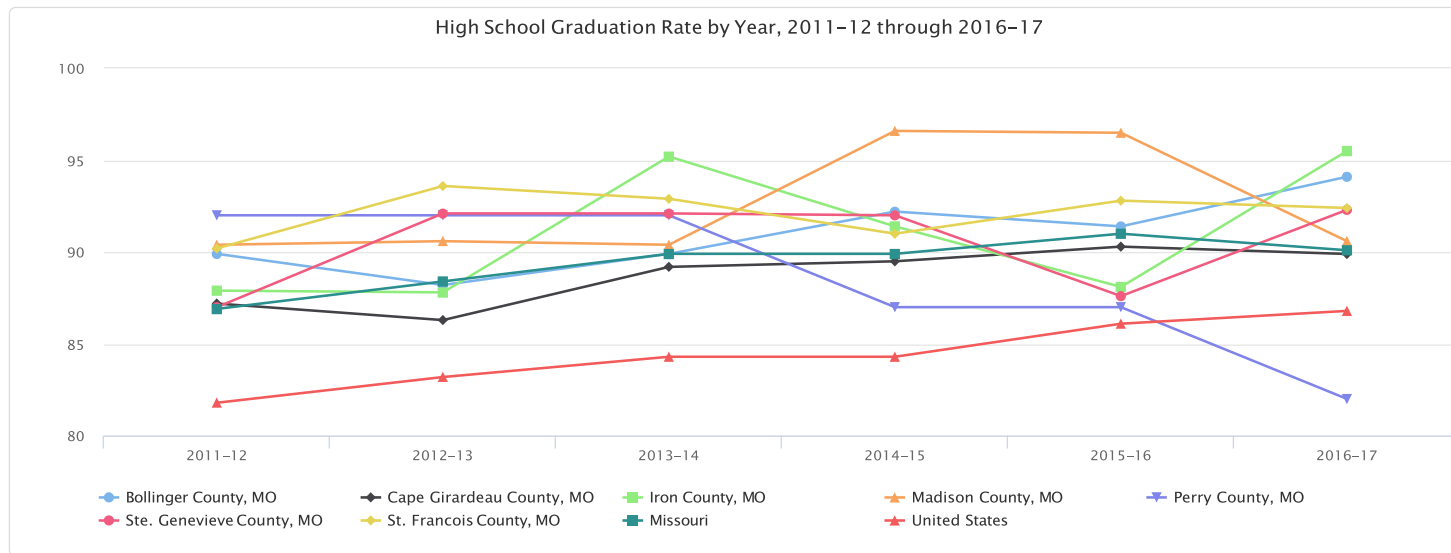


An analysis of all jobs and all workers in 2017 data with the Census Bureau *On The Map* website shows that 70.2% of the population live and work in the region.



## Education

The quality of local educational facilities is a significant consideration for companies seeking new locations, both from the standpoint of providing quality educational opportunities for company employees and their families and the ability of the local educational system to provide a workforce capable of meeting increasingly technical demands. The quality of public education throughout the Southeast Missouri Region is at a level of attainment conducive to companies requiring a skilled work force. All of the 23 school districts in the region are accredited (highest ranking possible) by the Missouri Department of Elementary and Secondary Education. Data from the 2016-2017 school year show 90.7% students are receiving their high school diploma within four years. That is 3.9% better than the national average.



Data Source: US Department of Education, [EDFacts](#). Accessed via [DATA.GOV](#). Additional data analysis by [CARES](#). 2016-17. Source geography: School District

Vocational-technical education is also an integral part of the Region’s comprehensive educational program. Four career and technology centers are available to students in surrounding school districts throughout the Region. These centers have cooperatively developed curricula that are responsive to the needs of local businesses and manufacturers. Residents in the Region have easy access to the educational resources of Southeast Missouri State University located in Cape Girardeau, which offers both baccalaureate and masters programs. Mineral Area College, a community college located in Park Hills, offers an associate degree program. Mineral Area College also offers courses at education centers located in Perryville and Fredericktown. There are 40,371 individuals with an Associate’s or higher in the region.

Report Area	Total Population Age 25+	Population Age 25+ with Bachelor's Degree or Higher	Percent Population Age 25+ with Bachelor's Degree or Higher
Report Location	146,674	27,906	<b>19.03%</b>
Bollinger County, MO	8,687	817	9.4%
Cape Girardeau County, MO	50,086	14,932	29.81%
Iron County, MO	7,387	865	11.71%
Madison County, MO	8,550	1,066	12.47%
Perry County, MO	13,028	2,123	16.3%
Ste. Genevieve County, MO	12,563	1,954	15.55%
St. Francois County, MO	46,373	6,149	13.26%
Missouri	4,100,209	1,155,709	28.19%
United States	216,271,644	66,887,603	30.93%

*Data Source: US Census Bureau, American Community Survey. 2013-17. Source geography: Tract*

## Healthcare

The Southeast Missouri region is served by a well-developed and growing network of healthcare facilities and providers. There are 10 licensed hospital facilities in the region, with at least one hospital located in all but Bollinger County. Tax-supported county health departments located in each of the seven counties provide a wide variety of free or low-cost medical and counseling services which are available and accessible to any county resident. County health departments in the region also work cooperatively with the Missouri Department of Health in developing emergency preparedness plans to deal with potential disease outbreaks and with the Homeland Security division of the Missouri Department of Public Safety in developing plans to cope with natural or other disasters. Because of the continued expansion of hospital infrastructure in these counties, the number of physicians, specialists and ancillary medical facilities continue to increase, and the health care industry contributes significantly to local economies.



In the region, 9.61% of population are without health insurance coverage, which is less than the state average. Access to healthcare indicates the overall health of the region.

Report Area	Total Population (For Whom Insurance Status is Determined)	Total Uninsured Population	Percent Uninsured Population
Report Location	207,229	19,912	<b>9.61%</b>
Bollinger County, MO	12,262	1,271	10.37%
Cape Girardeau County, MO	76,859	6,598	8.58%
Iron County, MO	9,953	1,483	14.9%
Madison County, MO	12,042	1,445	12%
Perry County, MO	18,824	1,102	5.85%
Ste. Genevieve County, MO	17,676	1,122	6.35%
St. Francois County, MO	59,613	6,891	11.56%
Missouri	5,961,514	621,543	10.43%
United States	316,027,641	33,177,146	10.5%

Data Source: US Census Bureau, American Community Survey, 2013-17. Source geography: Tract

## Manufacturing and Industry

Manufacturing provides a primary source of employment for much of the region's population and continues to show strong growth as a component of the overall economy. Growth in the manufacturing sector is important because manufacturers generally provide better paying jobs than do the other major economic sectors. Manufacturers also generally employ more workers than do most other businesses. Assisting growth and retention in the manufacturing segment of the economy has always been a primary objective of the SEMO RPC. Grant applications prepared by the Planning Commission's staff have secured millions of dollars in state and federal funding which have been used by communities in the District to construct the infrastructure necessary to attract and sustain manufacturing establishments. The District also operates a Revolving Loan Fund (RLF) program which can provide gap financing to new or expanding manufacturers. Jobs in manufacturing are generally among the highest paying in the region.

Manufacturing Activity 2010-2018

Report Area	2010				2018			
	Average Employment	Total Wages	Average Weekly Wage	Number of Firms	Average Employment	Total Wages	Average Weekly Wage	Number of Firms
Report Location	11,122	\$436,480,220	\$661	278	11,620	\$555,971,620	\$878	248
Bollinger County	187	\$4,182,089	\$426	15	168	\$4,351,119	\$499	11
Cape Girardeau County	3,785	\$176,501,929	\$896	108	3,908	\$209,498,316	\$1,031	96
Iron County	68	\$2,237,226	\$630	15	365	\$22,666,552	\$1,193	14
Madison County	401	\$11,463,325	\$454	16	516	\$17,299,433	\$645	14
Perry County	3,296	\$113,303,785	\$660	36	3,239	\$129,596,195	\$770	39
Ste. Genevieve County	1,514	\$62,428,645	\$792	32	1,391	\$86,625,947	\$1,198	26
St. Francois County	1,871	\$66,363,221	\$680	56	2,033	\$85,934,058	\$813	48

Source: Missouri Economic Research and Information Center (MERIC), Quarterly Census of Employment and Wages Industry Information by NAICS Sectors, 2010 & 2018

Industry Cluster by Number of Employees	Employment	Average Wage
Local Health Services	15,992	\$50,951
Local Hospitality Establishments	8,148	\$15,129
Local Real Estate, Construction, and Development	7,115	\$50,273
Local Education and Training	6,146	\$38,763
Local Motor Vehicle Products and Services	4,404	\$34,042
Government	4,286	\$50,315
Local Community and Civic Organizations	3,972	\$19,289
Local Commercial Services	3,666	\$36,151
Business Services	2,718	\$84,722
Food Processing and Manufacturing	2,696	\$55,037
Local Food and Beverage Processing and Distribution	2,177	\$26,315
Local Financial Services	2,008	\$55,263
Distribution and Electronic Commerce	1,977	\$58,685
Education and Knowledge Creation	1,847	\$60,564
Local Personal Services (Non-Medical)	1,555	\$21,819
Hospitality and Tourism	1,514	\$29,440
Construction Products and Services	1,400	\$74,675
Local Logistical Services	1,313	\$43,368
Local Entertainment and Media	1,298	\$42,135
Marketing, Design, and Publishing	1,297	\$34,028

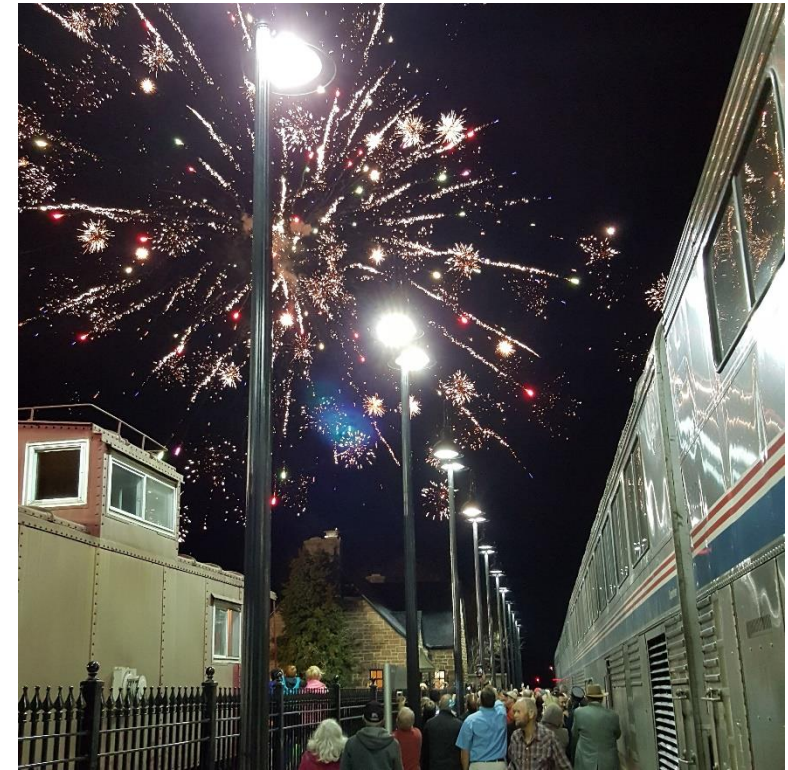
Industry Cluster by Income	Employment	Average Wage
Oil and Gas Production and Transportation	14	\$129,657
Communications Equipment and Services	13	\$112,404
Biopharmaceuticals	1	\$110,430
Information Technology and Analytical Instruments	161	\$103,289
Financial Services	365	\$86,723
Business Services	2,718	\$84,722
Electric Power Generation and Transmission	146	\$79,809
Coal Mining	3	\$78,700
Insurance Services	194	\$76,209
Construction Products and Services	1,400	\$74,675
Paper and Packaging	1,013	\$71,237
Downstream Chemical Products	130	\$70,486
Upstream Chemical Products	84	\$66,524
Aerospace Vehicles and Defense	1,148	\$64,757
Local Utilities	792	\$61,848
Medical Devices	48	\$61,721
Metal Mining	4	\$61,034
Education and Knowledge Creation	1,847	\$60,564
Forestry	32	\$59,997
Nonmetal Mining	553	\$59,913



## Tourism

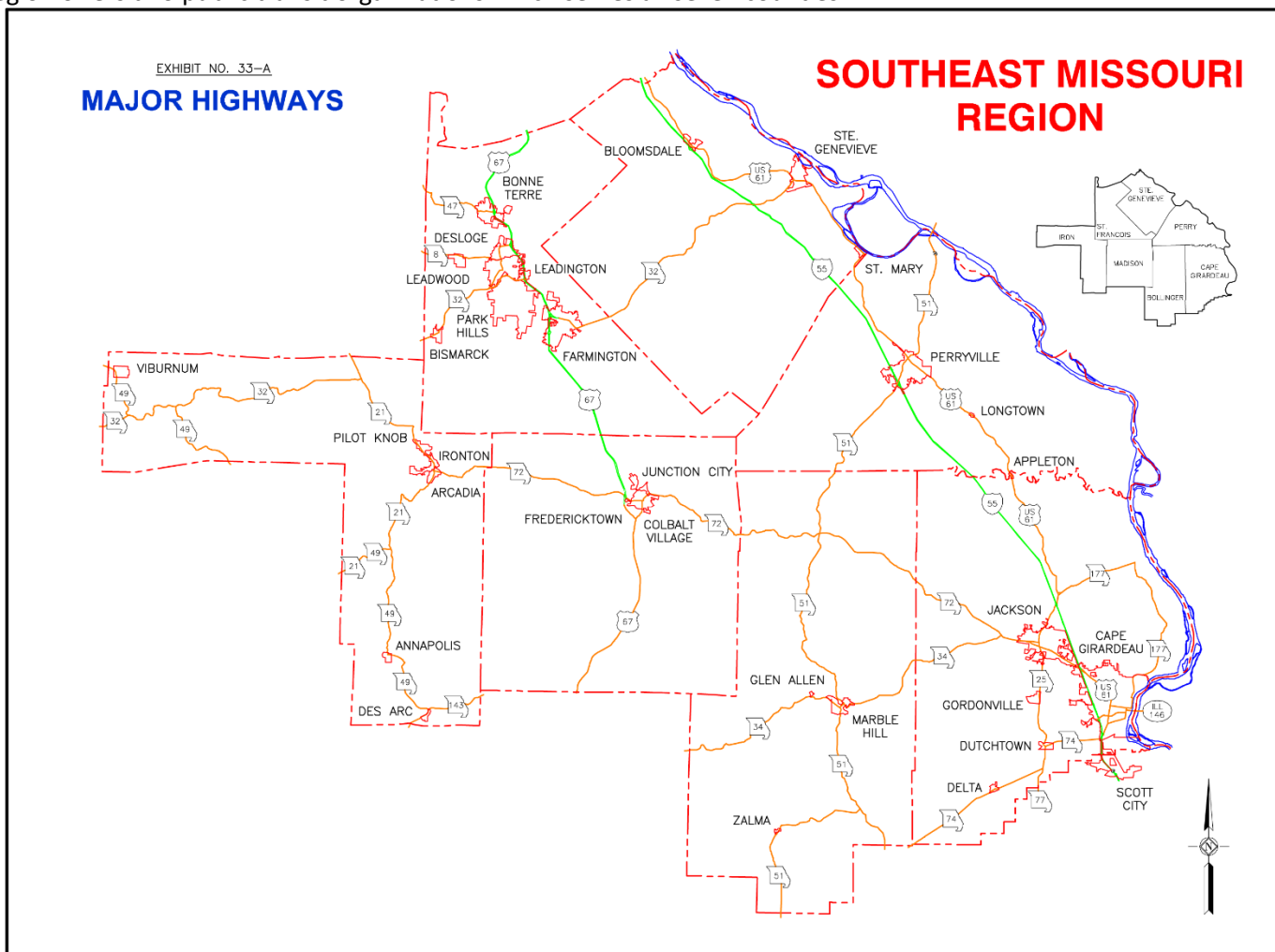
Tourism promotion, and the general expansion of the travel industry in the seven-county region, remains a priority. Efforts to help grow the travel industry have been successful, in part, because the State of Missouri recognized the value of this industry and has worked to form cooperative partnerships with local agencies and units of government. Tourism is a significant segment of the region's economy, generating over \$358 million in tourism-related expenditures and providing over 8,000 jobs for residents of the region. State policies regarding tourism and marketing funds have prohibitive budget and staffing requirements that threaten local communities competitiveness.

<b>Comparison of Tourism-Related Expenditures And Employment Southeast Missouri Economic Development District 2010 -2018</b>				
County Name	2010		2018	
	FY-10 Total Expenditures in 17 Tourism - Related SIC Codes	FY-10 Tourism- Related Employment	FY-18 Total Expenditures in 18 Tourism- Related SIC Codes	FY-18 Tourism- Related Employment
Bollinger	\$3,546,726	111	\$4,124,445	82
Cape Girardeau	\$143,551,473	4,098	\$193,358,088	4,377
Iron	\$5,264,706	187	\$6,066,241	191
Madison	\$7,006,589	251	\$9,605,413	275
Perry	\$17,643,674	702	\$24,675,641	578
St. Francois	\$81,822,386	2,230	\$90,525,362	2,353
Ste. Genevieve	\$10,536,427	421	\$16,262,884	470
Totals	\$269,371,881	8,000	\$344,618,074	8,326
Source: Missouri Division of Tourism Annual Reports, FY-2010 and FY-2018				

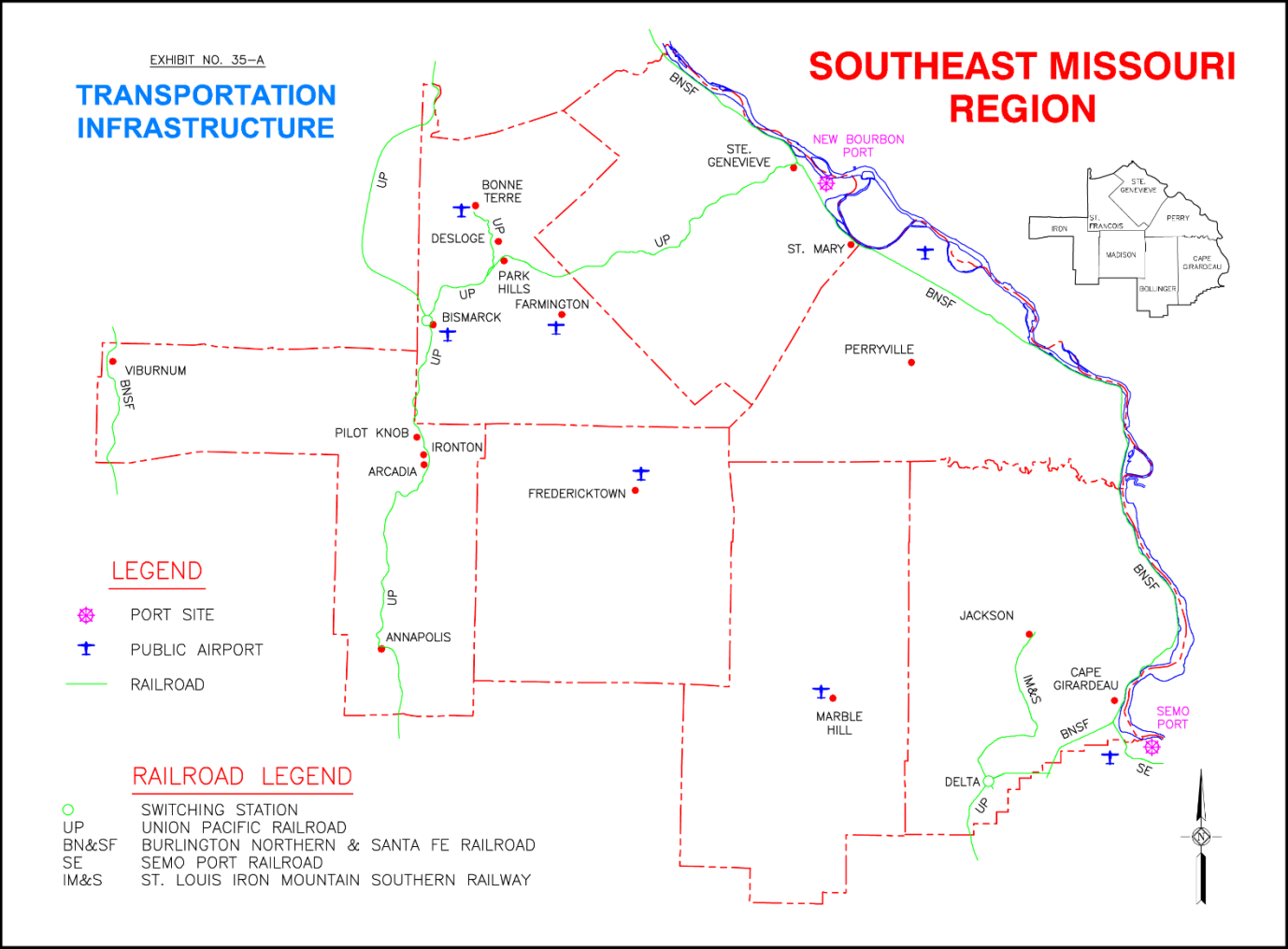


## Transportation

Transportation occupies a key position in the region's planning. The SEMO RPC works closely with the staff of the Missouri Department of Transportation to provide local input into the state transportation planning framework process. This input is gathered through the Southeast Missouri Regional Transportation Advisory Committee (TAC). The TAC prioritizes highway and other modal transportation needs in all the counties of the region. Southeast Missouri region is served by a transportation system which includes highways, public transit, railroads, airports and river traffic. The highway grid is the region's most highly developed transportation system and fulfills most of the region's public and industrial transportation needs. There are seven primary highway corridors through the Southeast Missouri region: Interstate 55, U. S. Highway 67, U. S. Highway 61, Missouri Highways 32/8, Missouri Highway 34, Missouri Highways 72/21, and Missouri Highway 51. Public transportation is vital to residents who, because of age, disability, inability to drive or lack of a vehicle, have no other means of accessing health and other necessary services. The region offers two public transit organizations which serves all seven counties.



The region is served by two first class railroads, the Union Pacific Railroad and the Burlington Northern Santa Fe Railway. The Union Pacific also has an Amtrac stop in the City of Arcadia. Six public airports currently serve the general aviation needs of the Southeast Missouri region. Two public terminal facilities currently provide intermodal transfer service. The Southeast Missouri (Semo) Regional Port, owned and operated by the Southeast Missouri Regional Port Authority, is located at River Mile 48 on the Cape Girardeau County/Scott County line south of the City of Cape Girardeau. The Port of New Bourbon, owned and operated by the New Bourbon Regional Port Authority, is located at River Mile 120.5 on a 123-acre site located three miles south of Ste. Genevieve.



## *Embracing the Future Strategy*

The *Embracing the Future* strategy was completed in 2018 and the priorities expressed by the community are divided into a few key areas where improvement has great potential to positively drive Southeast Missouri region's economy. Those priorities are a regional approach, workforce development, improve infrastructure, and enhance our quality of life. Goals and objectives were formed by focusing on these priorities and keeping in focus the resilience of the region through the process.

### Section 2:

#### SWOT ANALYSIS

This section provides a summary of Southeast Missouri region's economic strengths, weaknesses, opportunities, and threats (SWOT). This analysis was conducted with the input from volunteers in regional meetings, interviews, and surveys. The SWOT feeds the strategy by recognizing the importance of the region's assets and by identifying challenges that must be addressed to drive economic prosperity.

<b><u>STRENGTHS</u></b> Parkland Redi Cost of Living Education Opportunities Work Ethic Transportation Tourism Rural Character Healthcare Metro Access Quality of Life	<b><u>WEAKNESSES</u></b> Public Transit Transportation off Major Routes Rural Housing Equity Vocation Education Industry/Education Communication Rural Broadband Access Marketing Efforts Mental Health Services
<b><u>OPPORTUNITIES</u></b> Farm to Table Destination Tourism Greying of the Region Apprenticeships Partnerships Collaboration Entrepreneurship Main Street Capitalism Digital Commuting	<b><u>THREATS</u></b> Generational Expectation of Work Ethic Education Funds View of Vocational Education Department of Tourism Policies Career Churn/Rollover Lack of Volunteerism Fear of Entrepreneurial Risk

## Strengths

**Parkland Redi.** Through the implementation of a USDA Rural Development Stronger Economies Together (SET) planning process involving Iron, Madison, St. Francois and Ste. Genevieve Counties, SEMO RPC staff prepared the Parkland Regional Economic Development Initiatives Plan (REDI) which was then sent to the U. S. Department of Agriculture for approval. The U. S. Department of Agriculture gave the plan its highest rating of “High Quality”. A website is in development to better market the Parkland area. This was a step outline in the Parkland Regional Economic Development Initiatives Plan.

**Cost of Living.** Residents in the SEMO RPC region enjoy a relatively low cost of living when compared to other parts of the nation. This allows opportunities for residents to transition to new jobs more easily while also attracting new residents from parts of the country with a much higher cost of living. The Council for Community and Economic Research indicates the cost of living in St. Louis, Mo (closest city with available data) is half that of San Francisco and over 25% lower than New York City.

**Education Opportunities.** Residents in the Region have easy access to the educational resources of Southeast Missouri State University located in Cape Girardeau, which offers both baccalaureate and masters programs. Mineral Area College, a community college located in Park Hills, offers an associate degree program. Mineral Area College also offers courses at education centers located in Perryville and Fredericktown. Additionally, vocational schools and the Work Ready Communities program work with employers to tailor educational offerings to employer needs.

**Work Ethic.** Many employers have lauded the value of the workers in the Southeast Missouri region and their work ethic. Employees are prepared to work evening shifts and can work independently. The workforce is committed to improving their skills and job training, which allows for increases in wages and productivity.

**Transportation.** The region is threaded with an Interstate, US Highways, Missouri Highways and two first class rail systems. Whether by road, rail or river, the region is an attractive place to live work and play. New distribution hubs for major brands have moved into the region due to the centralized location and access to the multimodal assets available. Additionally, there are 6 public airports in the region with one offering commuter service to O’Hare International Airport in Chicago.

**Tourism.** The region is blessed with multiple cultural and natural resources. The Trail of Tears State Park offers visitors picnic sites, horse trails, fishing and breathtaking views, as well as, a historic account of the Cherokee Indian relocation march through the region. The Battle of Pilot Knob State Historic Park hosts a civil war battle reenactment annually drawing in hundreds of participants and even more spectators. The natural wealth of parks and conservation areas along with historic relevance draw millions of dollars to the region annually.

**Rural Character.** Multiple venues across the region offer scenic views and the opportunity to unplug from the fast pace of life. Whether it be a winery perched on top of rolling hills overlooking a spring fed spring or a visit to the homestead to churn butter, visitors can feel the peace and enjoy the uncrowded pace of life. The close-knit communities, educational opportunities and the low cost of living have enticed many to leave city life behind them and settle in the region.

**Health Care.** The health care and social assistance sector is one of the fastest growing segments of the region. Health Care is by far the largest employer in the region. The region offers 10 licensed hospitals. A continued expansion to the health care system allows for increasing number of licensed and skilled jobs available. Tax-supported county health departments located in each of the seven counties provide a wide variety of free or low-cost medical and counseling services which are available and accessible to any county resident. County health departments in the District also work cooperatively with the Missouri Department of



Health in developing emergency preparedness plans to deal with potential disease outbreaks and with the Homeland Security division of the Missouri Department of Public Safety in developing plans to cope with natural or other disasters.

**Metro Access.** The seven-county region would be described as rural; however, the Cape Girardeau-Jackson area in Cape Girardeau County is designated an urbanized area. Cape Girardeau urban area is under an hour drive from most points in the region. Additionally, the St. Louis metropolitan area is 1-1.5hour drive from most points in the area. This is valuable access to an international airport, museums, theaters and 25 colleges and universities. Residents can enjoy the warmth and pace of rural living yet still have major city amenities close at hand.

**Quality of Life.** With multiple options for secondary and post-secondary education, healthcare, recreation, and entertainment, residents in the area have a high quality of life that helps retain current and attract new residents.

## **Weaknesses**

**Public Transit.** Due to the rural nature of the region, access to public transit is limited. While the region has two public transit organizations offering services to all the counties in the region, users are limited to service hours offered. Taxi and cab services are limited to the larger communities.

**Transportation off Major Routes.** Only three of the region's counties enjoy access to the Mississippi River and Interstate 55. This leaves the remaining four counties at a transportation disadvantage, making it harder to compete for businesses and residents. Access to major transportation can be associated with population loss with youth leaving for access to opportunity and elderly leaving for access to expanded health care.

**Rural Housing Equity.** Given the rural and economically suppressed nature of some parts of the region, some locations have very poor-quality housing options for residents. These poor quality or vacant structures can lead to multiple problems, ranging from impacts on resident health to blighted economic conditions.

**Vocation Education.** The culture of the value of a college degree has been ingrained in the parents and children of the region. Major employers across the region state concern for the future work force where there will be significant skills gaps. The stigma of a vocation degree is present in the minds of residents and seen as less than a college education despite the lower cost and the high wages.

**Industry/Education Communication.** Though there are some vocational programs in the region that offer industry-based curriculum, there is a significant short fall in skilled work force need. The greatest need for communication is between public schools and industry. Employers believe the school system may be endorsing colleges over vocational schools and skilled jobs.

**Rural Broadband Access.** Broadband tends to follow the major transportation thoroughfares. The more rural communities and residents in the region lack broadband access and must depend on other less reliable sources to access the internet. In some cases, students must travel to the public libraries or other locations in order to complete their schoolwork.

**Marketing Efforts.** The rural character of the area means very few communities are able to afford marketing campaigns and smaller communities do not have enough attractions to support significant tourism. However, the region as a whole has numerous attractions and could pool resources to fund marketing campaigns. Unfortunately, there is no consolidated effort to market the region, partly due to state funding mechanisms.

**Mental Health Services.** There is limited bed space for those with mental health issues. With the rise of opioid use across the nation, this region has not been spared. Opioid addicts benefit from mental health care services and those in our region are under served.

## Opportunities

**Farm to Table.** The growing interest in Farm-to-Table food and meals offers a unique opportunity for farmers and food processors to tap into a new market and increase sales.

**Destination Tourism.** Communities in the region have begun to invest in themselves to engage the tourist market. The Missouri National Veterans Memorial recently opened in Perry County with a full-size replica of the Vietnam War Memorial. The space will continue to be developed with a reflecting pool, mausoleum and cemetery for veterans. Other communities have existing amenities and natural resources that are under-marketed, including the St. Francois mountains, the Bonne Terre Mine SCUBA diving, and the Amtrac depot in Arcadia.

**Greying of the Region.** The region is vastly populated by the *Boomer* generation. Thirty percent of the region's population is 55 or older. With that age demographic comes low crime rates, service industry jobs and health care jobs. Marketing these favorable attributes may attract new residents and businesses.

**Apprenticeships.** The national skilled labor shortage is felt in the Southeast Missouri region too. Improved and expanded apprentice programs will improve worker skills when entering the workforce. Apprenticeships are a proven way to introduce students to work and career opportunities and prepare them with the skills needed to be successful in their first jobs. More opportunities for work-based learning are needed. A positive to help these programs to develop, is that workman's compensation covers ages 16 to 18. Other states pair high school seniors and juniors in apprenticeship with firms for advanced manufacturing, business operations and information technology.

**Partnerships.** Public/Private partnerships have been a boom to achieving regional goals and economic growth. The public/private partnership on air quality ensured the region wouldn't receive a non-attainment designation from the EPA. A public/private partnership led to the construction of the Missouri National Veterans Memorial. The success stories are endless but so are the opportunities to continue those relationships. Creating Destination Tourism and Apprenticeships require those public/private partnerships. The greatest opportunity for this relationship is in regional marketing for tourism, business and new residents.

**Collaboration.** Workforce skills are dependent on a school and industry collaborations. Work Ready Communities and vocational schools have begun to fill some of the local industry needs but there are still far more gaps. Public schools and local career and technology centers working with local industry will produce a skilled workforce that can shore up the current skills gaps and be prepared for the coming decade when the *Boomer* generation transitions out of the workforce.

**Entrepreneurship.** The region is beginning to nurture entrepreneurs through pitch competitions, youth and adult coding opportunities, access to micro lending for prototype development. Unfortunately, access to these programs are limited to the larger communities. Better marketing and a larger entrepreneur network would greatly increase potential for success in the more rural communities.

**Main Street Capitalism.** A few of the communities have developed revitalization groups for uptowns, downtowns or select neighborhoods. These groups have hosted fairs, fests, car shows and motorcycle rallies. The communities that have worked together in private and public partnerships to develop their schedule of events have experience economic booms. The business and elected official know that by working together they can increase their sales and tax revenues. However, many more communities are seeing a decline in their once booming downtowns or uptowns with empty store fronts and decreasing tax revenues. Encouraging this form of Main Street Capitalism will revitalize a host of communities in the Southeast Missouri region.

**Digital Commuting.** As access to broadband grows across the region, greater opportunity to digitally commute will become available. While these opportunities can be limited by internet access and a profession that allows for a digital commute, this will benefit the region in a multitude of ways, such as: reduced emissions, entrepreneurial growth, flexible schedules, and reduced travel expenses.

## Threats

**Generational Expectation of Work Ethic.** The residents of the Southeast Missouri region have always been known for their work ethic. They are known for their ability to work hard, do difficult task, work tough hours and get the job done. However, the difference in how the generations interpret work ethic has never been greater. Managers and supervisors need to recognize this when working and communicating with their staff based on their generation. Currently, there are 5 generations to be in the workforce currently. The analog age and digital age are meeting in the workplace daily and this can cause miscommunication and concepts of unequal work ethic.

**Education Funds.** Education is a cornerstone for economic development in the region. Community officials worry that shifts in state and federal priorities could lead to a loss in education funding for the region or could lead to a misallocation of funds within the education sphere which does not provide as much benefit to the region.

**View of Vocational Education.** A negative view of vocational schools and occupations has led to a skills gap in the region. If the skills gap is not addressed, there will be a catastrophic ripple across the region. Middle class skills represent the largest gap. Gaps exist in construction, HVAC, diesel mechanics, and the trades. These positions are foundational when operating a community and a lack of these skilled workers can lead to a downturn in services available.

**Department of Tourism Policies.** For communities to qualify for a Destination Marketing Organization, one full-time employee must be dedicated to promoting tourism in order to receive Missouri Department of Tourism marketing grants. Due to the rural climate and small communities, it is prohibitive to pay for a full-time employee only for the purpose of tourism when operating budgets are so tight. Relaxed policies would allow for a more regional approach to marketing all the wonderful natural and cultural resources the region has to offer.

**Career Churn/Rollover.** Those entering the workforce are likely to change careers as many as 4 to 7 times through the course of their lives. In the changing landscape of opportunity and the normalcy of changing careers, the professional workforce is in perpetual flux. This can lead to increased staffing costs for training. According to BLS Employee Tenure summary in January 2018, among jobs held by workers ages 25 to 34, the median tenure is 2.8 years. From ages 35 to 44, the median job duration was 4.9 years, and from 45 to 54, the median tenure at a job was 7.6 years. Median tenure rose to 10.1 years for workers aged 55 to 64.

**Lack of Volunteerism.** The Southeast Missouri region residents have a history of helping out and pitching in when a need has arisen, whether it be in the case of filling sandbags during a flood or supporting the American Legion fundraisers. In recent years, there has been a solid decline in members of the community willing to commit their time in support of a communal cause. The gap left by less volunteers will be felt by all of the communities, but it may impact the most vulnerable the most.

**Fear of Entrepreneurial Risk.** The region is abounding with entrepreneurs. It can be witnessed at the craft fairs and festivals or in idea pitches that are never followed. Many are afraid of change, failure, the unknown or committing to the expense of the risk. Without great access to information, capital and training the region is missing out on developing a thriving entrepreneurial market.

### Section 3: Strategy Direction/Action Plan

The Embracing the Future strategy direction and action plan is the result of extensive outreach and input from regional volunteers and stakeholders representing a diverse group of public, private, and non-profit organizations. The Southeast Missouri Regional Planning and Economic Development Commission and the *Embracing the Future Strategy* Team strive to build the relationships necessary to integrate these goals into agency strategies for each partnering organization.

#### *Embracing the Future Vision*

*It is the vision of the Southeast Missouri Regional Planning and Economic Development Commission to improve the quality of life of all the residents of the Southeast Missouri Region by planning for the sound and efficient use of the Region's land and resources, and by engaging in economic development activities which will continue to provide a healthy economy, capable of sustaining the Region's population.*

#### *Embracing the Future Key Goals*

##### **Goal 1: Increase the quantity, quality and variety of employment opportunities.**

**Objectives:** Continue to work to attract businesses that offer higher wage jobs with fringe benefits for residents of the Region.

Provide additional employment opportunities to retain area young adults, seeking through technology, incubators and vocational opportunities.

Promote regular meetings of economic developers from throughout the Region to share information and plan for future growth.

Continue to explore development of industrial parks and support collaborative efforts to develop a business park megasite capable of accommodating projects that require 500 acres or more where the property tax can be shared among several counties.

Retain and support existing industries and nurture new start-up businesses potentially through the development of incubators and partnerships with Work Ready Communities.

Partner with the Missouri Department of Economic Development and Missouri Partnership in targeting and recruiting high-growth industries into the Region.

Foster additional growth of the travel and tourism industry in all the counties of the Region.

Cooperate with agricultural and other organizations in promoting and developing programs and projects that enhance the value of agricultural commodities produced in the Region.

**Goal 2: Continue to develop non-transportation infrastructure necessary for future economic growth.**

**Objectives:** Continue to support a strong Economic Development District program to provide planning services and technical support to economic development projects in the District.

Continue to serve as a clearinghouse for information about grant programs and other financing mechanisms which can be used to assist in the development of public infrastructure needed for economic growth.

Encourage and support the expansion and maintenance of water, sewer, stormwater, street, electric, gas and telecommunication infrastructure in order to be prepared for future growth.

**Goal 3: Improve transportation structures and features for all modes of transportation.**

**Objectives:** Maintain the Public Transit–Human Services Transportation Plan for the Region to be used to improve transportation access for the elderly, disabled and low-income residents of the region.

Reduce the number and severity of traffic-related accidents in the region by improving highway safety and by continuing to support increased seatbelt use among area residents.

Continue to work to better prepare the region to be able to cope with significant increases in the volume of freight movements in and through the region in the future.

Support the modernization and expansion of the locks and dams on the Upper Mississippi and Illinois Rivers.

Continue to support Missouri's ports, rail and highway transportation network.

**Goal 4: Promote regionalism.**

**Objectives:** Continue to plan for the growth of the Region as a whole and for its various counties and communities, with an emphasis on those counties experiencing slower economic growth.

Identify and promote the attributes of the Region and its communities.

Expand the marketing of the seven counties as a region to manufacturers and business prospects.



Continue to market the region as a tourism destination in order to expand this segment of the economy.

Seek cooperation of the Department of Conservation to promote hunting as tourism.

Seek funding to expand the use of the EDD website to share information about the various counties and communities in the region and continue to develop links with other community-oriented websites.

Work to obtain cooperation among entities to electronically share their data.

#### **Goal 5: Develop affordable life-cycle housing.**

**Objectives:** Encourage the construction and maintenance of additional affordable efficient housing which is economically accessible and sustainable to low to moderate income residents and to young families with children.

Attract additional retirees who are on fixed incomes to locate in the EDD by providing new housing they can afford to purchase.

Explore and support funding sources which could be used to develop additional and affordable housing.

#### **Goal 6: Enhance the quality of life for all.**

**Objectives:** Assure that under-served counties have improved access to basic health care and trauma service.

Increase awareness of the recreational and cultural resources available in every county.

Continue to provide technical support in planning and developing new park and recreational facilities, open space, and trails by local units of government.

Support increased cooperation between career and technology centers and junior colleges; support stackable credentialing.

#### **Goal 7: Develop a regional finance network to foster economic growth.**

**Objectives:** Work with financial institutions throughout the region to develop a network of committed funds to be used to encourage economic growth.

Pursue opportunities to expand the Revolving Loan Fund Program operated by the EDD and seek funding from private and public entities to expand the loan capacity for economic development projects.

Identify individuals and organizations that can assist projects with “risk capital” for buy-ins in companies that require special financing to launch or expand product lines and capacity.

Establish a Small Business Administration 504 Certified Development Company.

**Goal 8: Foster regional technological development and internet integration.**

**Objectives:** Promote integration of websites; promote web compatibility and data integration within the region including capitalizing on middle and last mile line fiber optics.

Promote mobile integration.

Promote and seek funding for internet capabilities in education.

Encourage and support region-wide residential, commercial and industrial high-speed internet access.

**Goal 9: Address environmental issues.**

**Objectives:** Continue to inform on changing air quality regulations.

Promote water quality efforts.

Educate the region on Brownfields and Superfund site clean-up and funding opportunities.

Support the Southeast Missouri Solid Waste Management District in its objectives for solid waste disposal and recycling initiatives.

**Goal 10: Plan for disaster preparedness and recovery.**

**Objectives:** Promote regional education of Homeland Security assets.

Promote regional education of hazard mitigation plans.

Develop a plan of action to mitigate and respond to economic shifts and downturns.

## Section 4: Evaluation Framework

The Southeast Missouri Regional Planning and Economic Development Commission monitors the progress of the *Embracing the Future* Strategy while also implementing key aspects of the strategy including business and workforce development initiatives and regional marketing. SEMO RPC reports annually to EDA on progress year-round. Dozens of organizations in the Southeast Missouri region are participating in the development and implementation of strategies in support of the *Embracing the Future* goals. To achieve these goals, SEMO RPC staff will provide technical assistance to communities and local economic development organizations with community and economic development issues of local and regional importance. This activity could include providing information, giving presentations on local planning procedures and community development strategies, assisting with mapping needs, coordinating discussions with state regulatory and funding agencies, EDA grant writing assistance, and assisting local government membership with grant funding requests from other federal and state agencies. Full planning efforts may also be undertaken by the Commission in order to assist communities with developing community comprehensive plans and economic development strategies.

*Embracing the Future* has the following core metric indicators:

Metric	2018 Benchmark	5 Year Trend
Population	217,017	218,731
Workforce Population	103,059	103,873
Jobs	100,615	101,409
Average Wage	\$39,990	\$42,745
Associates Degrees or Higher	40,371	40,689

## Resilience

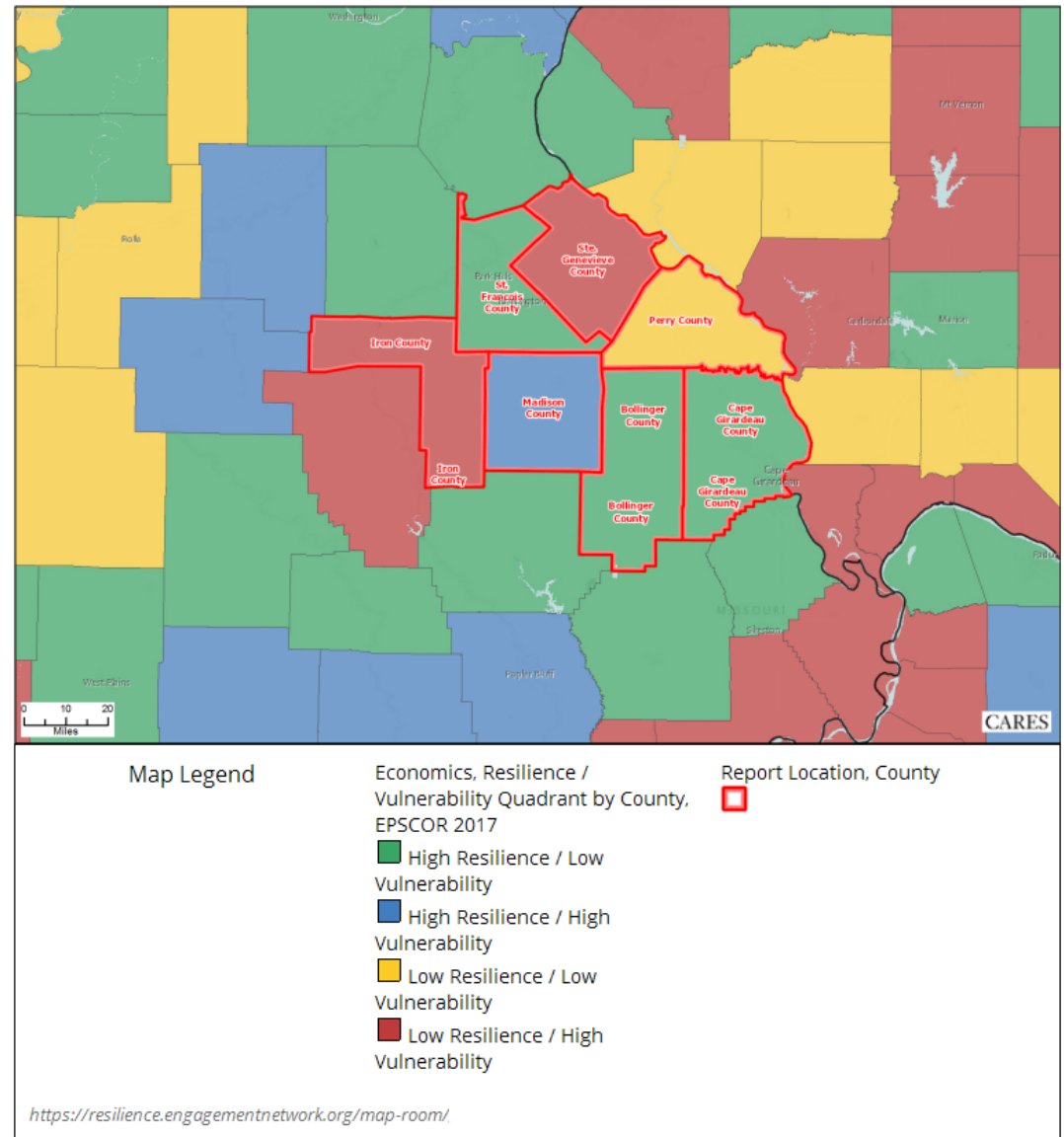
### Economic

EDA urges communities to consider how regional economic prosperity is linked to an area's ability to prevent, withstand, and quickly recover from major disruptions to the economic base. Disruptions to a regional economy can be created by:

- Downturns or other significant events in the national or international economy which impact demand for locally produced goods and consumer spending;
- Downturns in particular industries that constitute a critical component of the region's economic activity; and/or
- Other external shocks (a natural or man-made disaster, closure of a military base, exit of a major employer, the impacts of climate change, etc.).

Economic resilience is the ability of a region to withstand and recover from economic shocks such as natural disasters, downturns in an industry that a region is reliant upon, the closure of a major employer or any other national or global market shift. The Institute of Public Policy at University of Missouri, with funding from a National Science Foundation EPSCoR grant, spent three years researching what makes communities resilient in the face of natural and human-made threats and developed an index to identify counties based on their resilience and vulnerability. The region has 3 counties with high economic resilience and low economic vulnerability. Two counties have low economic resilience and high vulnerability due to their reliance on few employers to drive their economies.

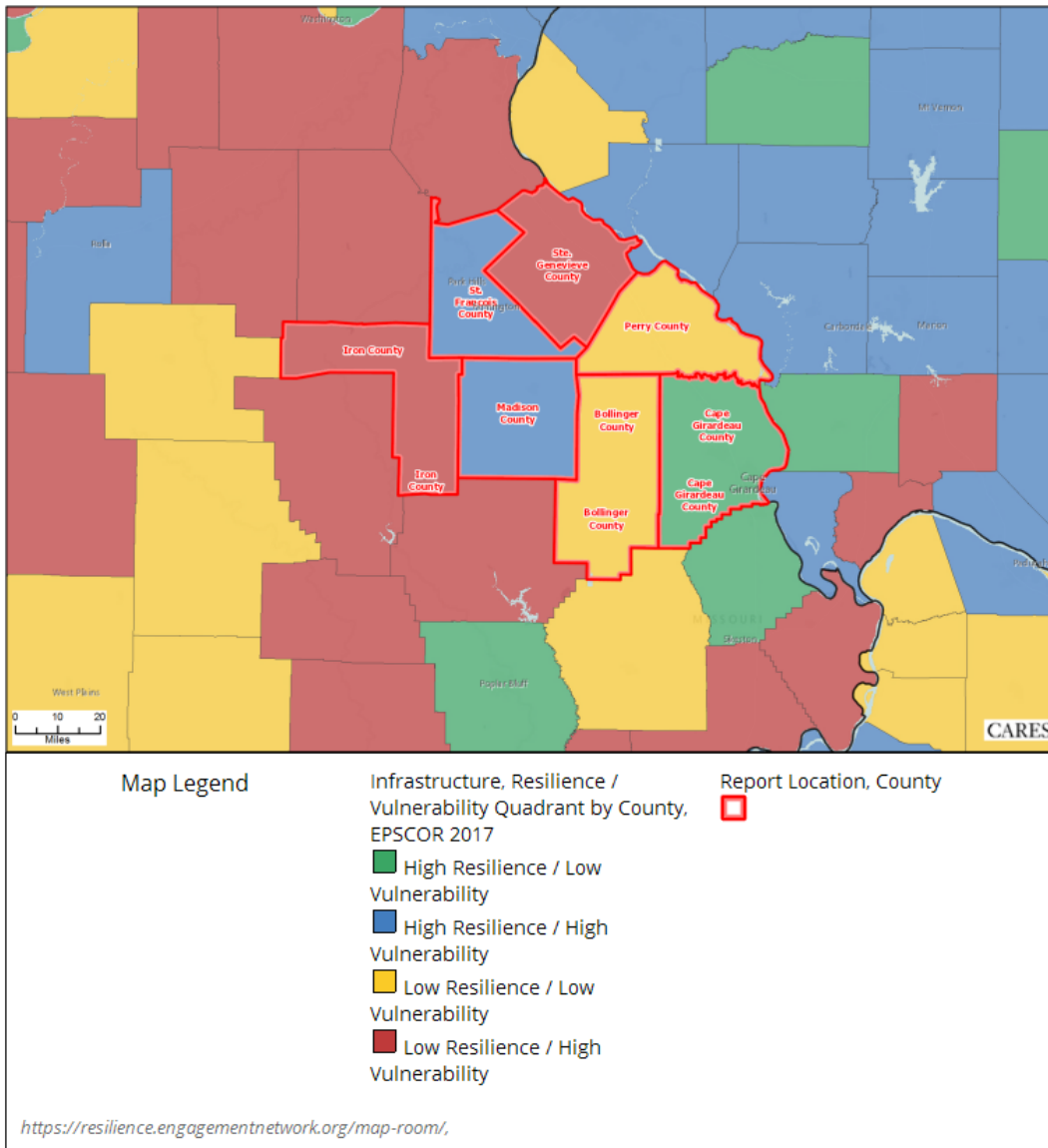
### Economics, Resilience/Vulnerability

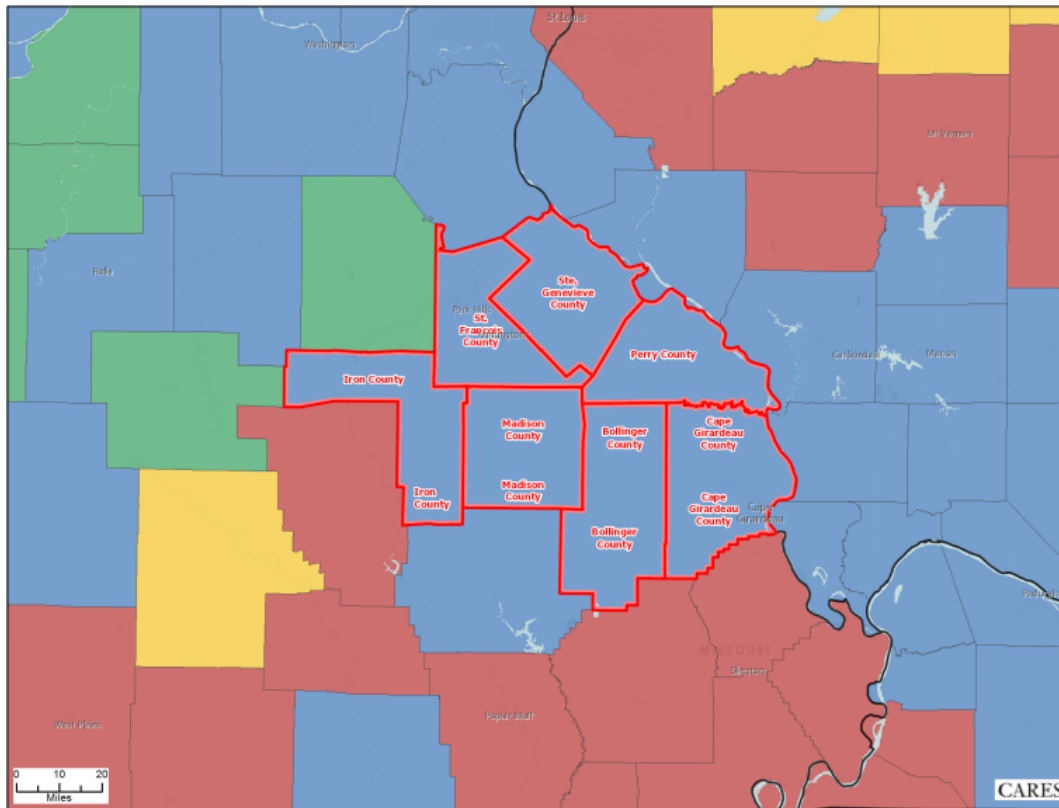


## Infrastructure R&V

## Infrastructure

Two counties have high vulnerability and low resilience in regard to infrastructure. The entire region struggles with upgrading aging roads, water treatment, wastewater systems and other integral components necessary to keep a community running smoothly while attracting new residents and industry. The SEMO RPC staff works diligently with communities to assist rate priorities and seek funding.





#### Map Legend

Environment, Resilience /  
Vulnerability Quadrant by County,  
EPSCOR 2017

- High Resilience / Low Vulnerability
- High Resilience / High Vulnerability
- Low Resilience / Low Vulnerability
- Low Resilience / High Vulnerability

Report Location, County



<https://resilience.engagementnetwork.org/map-room/>, 2/6/2020

## Environment

The region has long dealt with life along the side of the Mississippi River with many communities impacted by flooding from the Mississippi itself or its tributaries. The entire region is high resilience and high vulnerability showing that it is constantly at threat but also a master at recovery. The region is also in the New Madrid Seismic Zone. SEMO RPC staff participate in and contribute to earthquake exercises, training and preparedness.



## Appendix:

Agendas for meetings

Unemployment data

CARES Report, University of Missouri

2018 Annual Progress Report

2019 Annual Progress Report

Regional Entrepreneurship Assessment & Strategy, Southeast Missouri State University

Regional Technology Planning Teams Tool Kit, Recovery.gov

StatsAmerica Region Report