

GAINESVILLE AND HALL COUNTY COMPREHENSIVE PLAN



ECONOMIC DEVELOPMENT ELEMENT

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2.0.0.0: ECONOMIC DEVELOPMENT

Gainesville and Hall County have enjoyed a strong economic base over the past several decades. Historically, the economy has revolved around the agriculture and manufacturing industries. As the area continues to evolve in the first part of the century, local leaders feel the challenge is to promote and foster broad employment opportunities and economic diversity. Gainesville and Hall County should continue to exploit their natural and cultural assets to attract and retain employers. The City and County are striving to work in unison to create an environment conducive for economic development and diversification, along with local agencies and organizations connected to the economic and development community. Gainesville and Hall County will continue to support and enhance the economic viability of its hallmark industries while being flexible enough to respond to market forces. The projected population increase and growing labor force will afford opportunities to capitalize on the growing regional marketplace in the planning horizon.

2.1.0.0: ECONOMIC DEVELOPMENT INVENTORY

Gainesville/Hall County has been hailed as the “Poultry Capital of the World” in large part because the county generates over \$720 million annually in poultry related products and services. Agriculture and agribusiness have been the economic mainstays of the Gainesville/Hall County area for over a century. The economic base, now diversified, includes automotive supplies, distribution centers, manufacturing, and office and technology parks. Hall County has approximately 300 manufacturers, 47 Fortune 500 firms, including 40 foreign companies, representing 14 countries.

2.1.1.0: ECONOMIC BASE

2.1.1.1: Agriculture

Hall County ranks second in the State of Georgia in Total Farm Gate Value at \$229,093,720. Hall County ranks second in the state in Total Poultry and Egg Value. Hall County has 640 Broiler-Grower houses with a capacity of 25,600. The total farm gate value generated from the Broiler-Grower category is \$21,395,984. In addition, Hall County ranks number 12 in the state in beef stock. There are 4,500 head of beef in the County contributing to the overall agribusiness base. *Source: The University of Georgia, College of Agricultural and Environmental Sciences, 2002*

2.1.1.2: Tourism

The most significant natural feature in Hall County is Lake Sydney Lanier, which is a 38,000-acre lake, attracting over 10 million visitors each year. Sporting venues including Road Atlanta and Lake Lanier provide the largest single source of room night revenues in the county, creating a major economic impact resulting in the tourism industry’s \$180 million in revenues for Hall County businesses annually. Road Atlanta is part of the Panoz Motor Sports Group. The owner has invested in both safety and fan amenity improvements to the facility since purchasing it in 1996. The Road Atlanta schedule has about 12 events per year.

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Lake Lanier's water sport's facilities gained international attention during the 1996 Atlanta Centennial Olympic Games. The site acted as the host for rowing and sprint canoe/kayaking events. Lake Lanier continues to be a prime location for international rowing events. The 33rd International Canoe Federation Flatwater Racing World Championships were held September 11 – 14, 2003 at the Lake Lanier Olympic Center. Approximately 600 athletes and coaches and 500 international guests attended the event. The event generated over \$3 million dollars in direct and indirect benefits to the local economy.

Hall County received \$180 million in tourism income in 2001. Hall County's tourism expenditures supported over \$49 million in tourism payroll. There are more than 3,100 people employed in the tourism industry in Hall County. A total of 7.23 million dollars in state tax revenue was generated. About 3.72 million tourists visited the North Georgia mountains area.

Table I: Northeast Georgia Mountains Travel Region 2001 Tourism Economic Impact

Northeast GA Mountains Counties	Expenditures	Jobs	Wages	State Taxes
Banks	\$33,227,873	268	\$5,153,914	\$1,329,115
Barrow	\$108,925,619	449	\$5,521,903	\$4,357,025
Dawson	\$32,856,554	380	\$6,946,612	\$1,314,262
Elbert	\$20,953,800	200	\$2,225,955	\$838,152
Forsyth	\$74,765,066	1,317	\$18,617,205	\$2,990,603
Franklin	\$30,241,018	319	\$3,266,118	\$1,209,641
Habersham	\$31,330,306	607	\$7,335,952	\$1,253,212
Hall	\$180,958,243	3,116	\$49,559,755	\$7,238,330
Hart	\$19,273,624	296	\$3,380,599	\$770,945
Jackson	\$26,218,406	587	\$7,684,037	\$1,048,736
Lumpkin	\$46,582,312	415	\$5,393,036	\$1,863,292
Madison	\$12,123,533	78	\$739,783	\$484,941
Rabun	\$60,643,851	542	\$6,713,492	\$2,425,754
Stephens	\$20,879,234	362	\$3,957,874	\$835,169
Towns	\$68,036,034	382	\$6,891,178	\$2,72,441
Union	\$36,760,368	252	\$2,345,165	\$1,470,415
White	\$127,763,050	541	\$6,143,423	\$5,110,522
Northeast GA Region Total	\$931,538,891	10,110	\$139,876,001	\$37,261,556
State Total	\$ 16 billion	198,000	\$3.289 billion	\$643.8 million

Source: Davidson-Peterson Study for Georgia Department of Industry Trade and Tourism

The tourism industry is supported by the Georgia Mountains Center and the Gainesville Civic Center. These two venues provide meeting space for conferences, workshops, concerts, and tourism related events like the international rowing competition. The Georgia Mountains Center contains 72,000 square feet of meeting space; 22,000 square feet of exhibit space; and a 300 seat high-tech theatre. The Gainesville Civic Center provides meeting space for local and regional events in the northeast Georgia area. The Civic Center contains 16,250 square feet of meeting space and 10,700 square feet of exhibit space.

2.1.1.3: Transportation

The major transportation link in Hall County is I-985/GA 365 Lanier Parkway, which is a four lane, limited access highway leading to I-85. I-85 provides access to I-75, I-20, I-285, and GA 400 in Atlanta.

The Lee Gilmer Airport in Gainesville supports both local air travel and corporate commuters. The FAA approved facility, has a 5,500-foot runway and 4,000-foot runway. Instruction and aircraft rental, charter, maintenance, storage, sales, transient parking and car rental are available as well as a conference room for fly-in meetings. The Hartsfield-Jackson International Airport is a one-hour drive via I-985 to I-85 south. The airport provides non-stop domestic and international flights daily. The rail lines, which service the County, are the Norfolk-Southern Railway and the CSX Railway.

2.1.1.4: Commercial Development

The major regional retail center in the City and County is along the Shallowford Road-Dawsonville Highway corridor on the west side of Gainesville. The Colonial Lakeshore Mall is the hub of the retail activity along the corridor. The mall is 518,290 square feet in size and has 77 tenants. The mall generates between \$75 – \$90 million dollars of sales and employs approximately 500 people. JC Penney, Sears, and Belks anchor the mall. Within this ½ mile corridor major retailers such as Target, Wal-mart, Lowe’s, Kohl’s and Home Depot have stores.

There are other significant commercial nodes in the City of Gainesville. The downtown square encompasses about 35 businesses including specialty shops, offices, and restaurants. In 2002 the City of Gainesville conducted a study of the Midtown area of Gainesville. Portions of the area have become blighted and stagnant in opportunities for development. The Midtown Study was initiated to assess the feasibility of redeveloping the area. The Green Street corridor is home to a number of offices, restaurants and structures with historic significance. The major commercial corridors in the City of Gainesville are Thompson Bridge Road, Limestone Parkway, S. Enota Drive, Browns Bridge and Jesse Jewell Parkway. These corridors contain restaurants, grocery stores, retail stores, and other commercial activities.

2.1.1.5: Northeast Georgia Medical Center

The Northeast Georgia Medical Center is the largest non-manufacturing employer in the City and County with more than 4,500 employees. A report from the Georgia Hospital Association shows that NGHS contributed more than \$572 million to the economy of Hall County and the surrounding area in 2001. The report revealed that NGHS directly spent more than \$190 million with Hall County area businesses in 2001; however applying a multiplier developed by the United States Department of Commerce’s Bureau of Economic Analysis to this figure shows NGHS’ total impact on the local community was more than \$427 million. This multiplier considers the “ripple effect” of direct hospital expenditures on other areas of the economy. (Source: *Communicare: Northeast Georgia Medical Center’s Master Facility Plan, Volume XX, Number 3*)

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2.1.2.0: EMPLOYMENT STATISTICS

2.1.2.1: Employment by Sector

The following table illustrates the current employment by sector for Hall County and the State of Georgia. Data for the city of Gainesville was unavailable by employment sector. However, other employment statistics for the city were available from the Census and they have been provided in following sections.

Table 2: Employment by Sector

Category	Hall County									
	1980	1985	1990	1995	2000	2005	2010	2015	2020	2025
Total	39,979	48,478	55,877	68,272	79,406	85,915	91,818	97,375	102,629	107,607
Farm	1,807	1,705	1,530	1,158	979	908	845	793	754	724
Agricultural Services, Other	309	585	625	746	840	814	812	823	845	878
Mining	74	49	103	93	172	179	184	189	194	199
Construction	1,972	2,919	3,522	3,911	5,267	5,473	5,585	5,668	5,745	5,834
Manufacturing	12,180	14,159	14,372	16,521	19,362	20,875	22,213	23,274	24,031	24,474
T.C.U.*	1,315	1,520	1,666	2,197	2,863	3,331	3,717	4,039	4,303	4,508
Wholesale Trade	2,310	2,606	2,981	3,029	4,418	4,810	5,161	5,472	5,741	5,967
Retail Trade	5,869	7,504	8,397	10,719	11,704	12,662	13,659	14,632	15,583	16,531
F.I.R.E.**	2,299	2,914	3,542	4,056	5,165	5,762	6,182	6,517	6,809	7,077
Services	6,194	8,247	12,813	18,225	20,278	21,984	23,683	25,627	27,848	30,360
Federal Civilian Government	422	439	491	449	461	477	487	492	490	482
Federal Military Government	319	416	424	453	468	475	481	485	488	488
State & Local Government	4,909	5,415	5,411	6,715	7,429	8,165	8,809	9,364	9,798	10,085

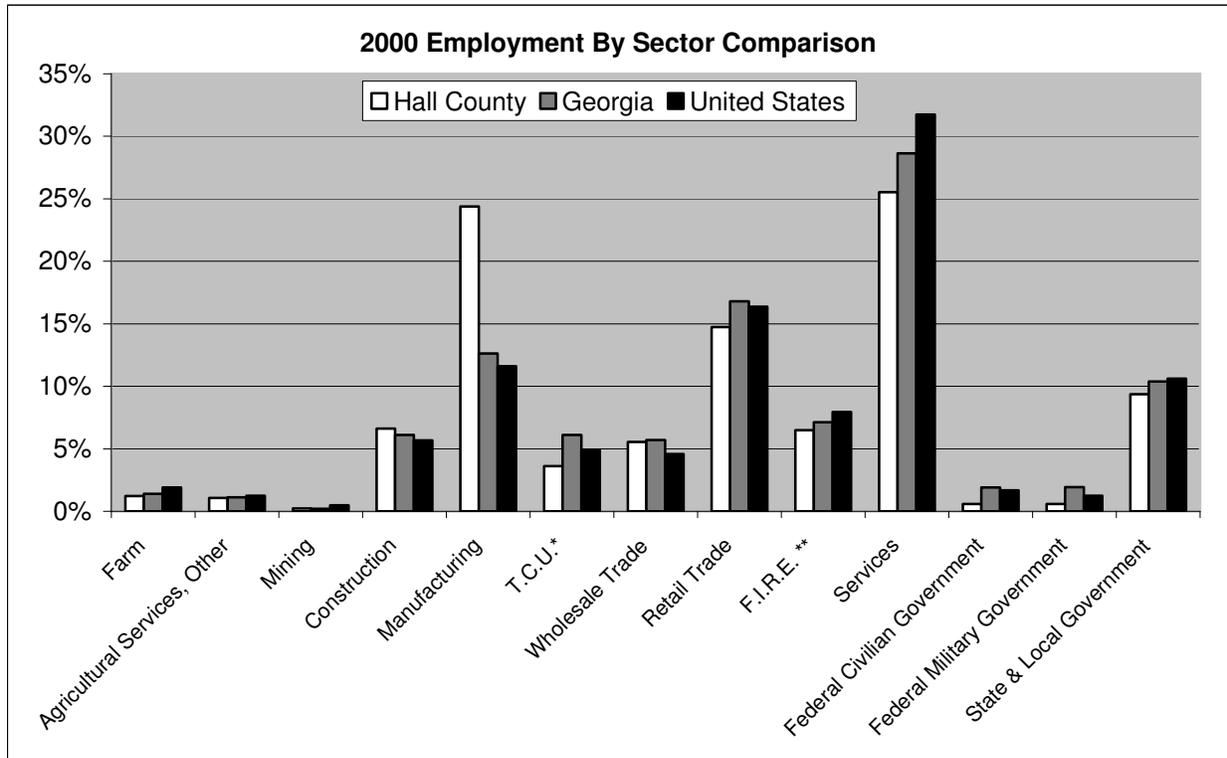
Source: Woods & Poole Economics, Inc.

* Transportation, Communications and Utilities.

** Finance, Insurance and Real Estate.

From 1980 to 2000, Hall County experienced a decrease in the percentage of manufacturing sector jobs as service sector employment surpassed the former lead sector in 1995, increasing from 6,194 jobs in 1980 to 20,278 in 2000. However, the county still saw growth in the manufacturing sector, increasing from 12,180 manufacturing jobs in 1980 to 19,362 in 2000. In fact, the only sector in which employment has decreased is farming. This sector has lost nearly half the jobs reported in 1980.

The percentage of employment by sector in Hall County for the year 2000 is compared to state and National percentages to establish the condition of the County in relationship to the state and nation. The following chart illustrates this comparison.



Source: Woods & Pool Economics, Inc.

* Transportation, Communications and Utilities.

** Finance, Insurance and Real Estate.

Hall County has higher percentages of the employed population working in Construction and Manufacturing sector jobs than both the state and the nation. The excess in these sectors is reflected in lower percentages of employment in the other sectors, especially when compared to the state and nation. Most notably the County has a lower percentage of the employees working in Transportation, Communication and Utility sector employment, Retail Trade, and Services. When the same data is reviewed for historic trends, the county has remained constant in comparison to the state and nation, following similar shifts in trends except in farming. When the percentage of Hall County jobs in farming was compared to the same at the state and national level in 1980 and 1990, the county was slightly higher than the state, and nation. However, in 2000, the County fell behind both, indicating a significant change in the jobs in the county, where it is experiencing an employment shift away from the farming sector.

Trends prepared by Woods & Pool Economics, Inc. show Hall County with a decrease in farm employment to 2025 where it is projected to comprise only 0.67% of the County's employment. This fall in farm employment is similarly reflected in projections for Georgia where it is projected to be 0.82% by the same year. Both the County and State are projected to experience greater loss of farm employment than the nation, which is anticipated to maintain 1.29% employment in the farm sector. Nationally and at the State level, Agricultural Services are anticipated to maintain a similar percentage of the employment. However, Hall County is projected to have a decline from the present in this sector.

Manufacturing sector employment in the county is anticipated to continue to contribute a high percentage of the employment. Woods & Pool projects approximately 22.74% of employment will be in the manufacturing sector in 2025. This percentage is drastically higher than that of the State (9.97%) and the Nation (9.5%). While service sector employment will progressively

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constitute a higher percentage of the employment on the state (33.35%) and national (37.21%) level, Hall County may stay well below these averages at 28.21%, which is an increase over the 2000 percentage. Similar to state and national averages the employment in construction sector employment is anticipated to slowly taper down towards 2025.

2.1.2.1: Earnings by Sector

Not surprisingly, the employment earnings reflect trends in the employment sector data for the County, with manufacturing contributing the highest percentage of earnings in the county for 2000, service sector showing a significant increase and farm earnings falling from 1980. Table 3 illustrates historic earnings by sector for Hall County, and the projected earnings are illustrated in Table 4.

Table 3: Historic Earnings by Sector (Hall County)

	1980	1985	1990	1995	2000
Total (1996 \$)	\$858,912,000	\$1,120,600,000	\$1,376,330,000	\$1,707,290,000	\$2,238,810,000
Farm (1996 \$)	\$4,653,000	\$31,991,000	\$45,203,000	\$33,624,000	\$31,745,000
Agricultural Services, Other (1996 \$)	\$5,470,000	\$8,920,000	\$10,509,000	\$12,286,000	\$14,157,000
Mining (1996 \$)	\$4,099,000	\$2,234,000	\$2,483,000	\$2,879,000	\$5,501,000
Construction (1996 \$)	\$45,111,000	\$70,412,000	\$91,226,000	\$106,177,000	\$155,571,000
Manufacturing (1996 \$)	\$291,835,000	\$360,922,000	\$398,171,000	\$500,464,000	\$645,215,000
T.C.U.* (1996 \$)	\$44,442,000	\$49,741,000	\$54,510,000	\$70,785,000	\$104,185,000
Wholesale Trade (1996 \$)	\$60,924,000	\$69,071,000	\$91,071,000	\$100,099,000	\$156,829,000
Retail Trade (1996 \$)	\$100,304,000	\$130,035,000	\$126,729,000	\$164,869,000	\$214,942,000
F.I.R.E.** (1996 \$)	\$33,437,000	\$45,281,000	\$73,833,000	\$105,716,000	\$141,008,000
Services (1996 \$)	\$141,182,000	\$183,299,000	\$299,005,000	\$396,461,000	\$503,716,000
Federal Civilian Government (1996 \$)	\$19,279,000	\$21,726,000	\$23,645,000	\$23,246,000	\$25,628,000
Federal Military Government (1996 \$)	\$2,480,000	\$4,916,000	\$4,702,000	\$5,120,000	\$6,056,000
State & Local Government (1996 \$)	\$105,696,000	\$142,053,000	\$155,239,000	\$185,565,000	\$234,261,000

Source: Woods & Pool Economics, Inc.

* Transportation, Communications and Utilities.

** Finance, Insurance and Real Estate.

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Table 4: Projected Earnings by Sector (Hall County)

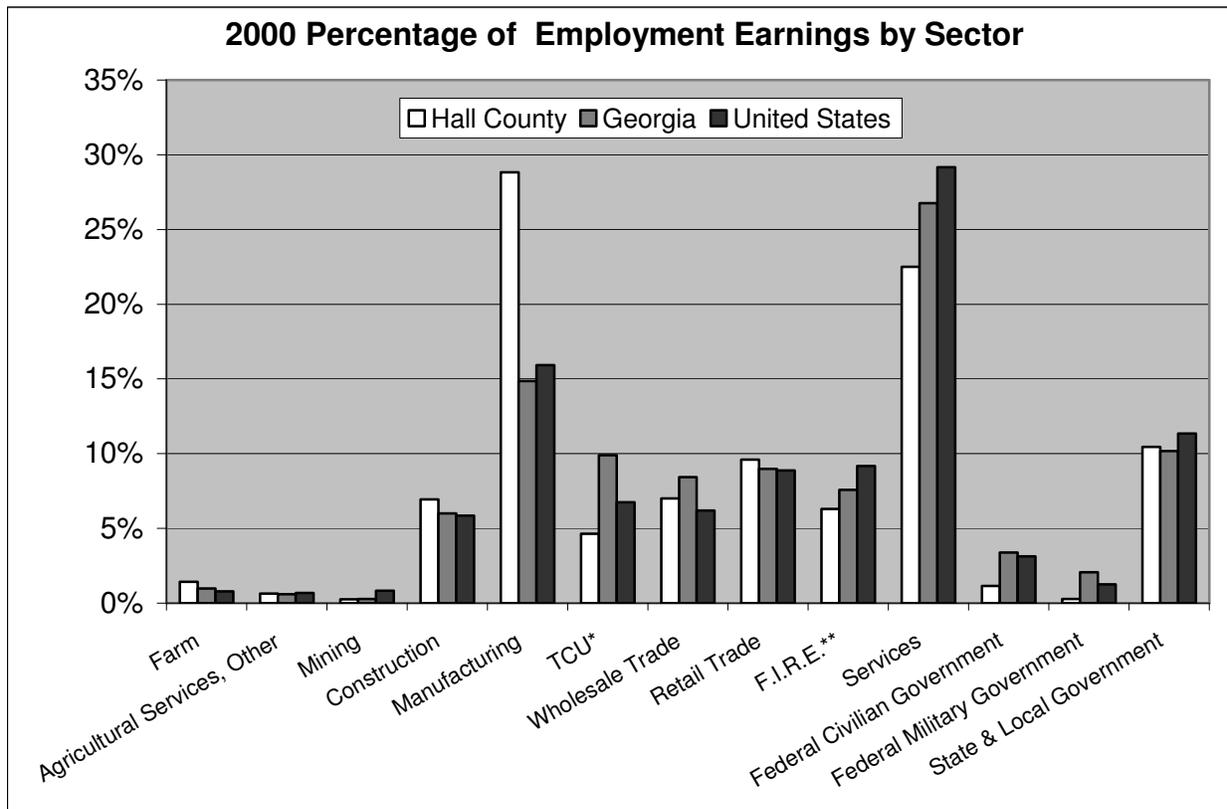
	2005	2010	2015	2020	2025
Total (1996 \$)	\$2,549,630,000	\$2,855,860,000	\$3,163,630,000	\$3,472,450,000	\$3,781,350,000
Farm (1996 \$)	\$32,502,000	\$33,290,000	\$34,331,000	\$35,730,000	\$37,570,000
Agricultural Services, Other (1996 \$)	\$14,418,000	\$15,026,000	\$15,881,000	\$16,978,000	\$18,354,000
Mining (1996 \$)	\$5,782,000	\$6,011,000	\$6,235,000	\$6,467,000	\$6,710,000
Construction (1996 \$)	\$167,255,000	\$175,948,000	\$183,844,000	\$191,692,000	\$200,155,000
Manufacturing (1996 \$)	\$738,878,000	\$832,163,000	\$920,237,000	\$1,000,250,000	\$1,069,740,000
T.C.U.* (1996 \$)	\$127,757,000	\$149,626,000	\$170,003,000	\$188,701,000	\$205,319,000
Wholesale Trade (1996 \$)	\$174,883,000	\$191,962,000	\$208,003,000	\$222,843,000	\$236,344,000
Retail Trade (1996 \$)	\$237,652,000	\$261,947,000	\$286,632,000	\$311,745,000	\$337,631,000
F.I.R.E.** (1996 \$)	\$169,995,000	\$195,754,000	\$220,224,000	\$244,260,000	\$268,243,000
Services (1996 \$)	\$581,182,000	\$662,926,000	\$757,023,000	\$865,897,000	\$991,488,000
Federal Civilian Government (1996 \$)	\$27,487,000	\$29,095,000	\$30,360,000	\$31,252,000	\$31,756,000
Federal Military Government (1996 \$)	\$6,425,000	\$6,794,000	\$7,158,000	\$7,516,000	\$7,863,000
State & Local Government (1996 \$)	\$265,412,000	\$295,317,000	\$323,701,000	\$349,115,000	\$370,177,000

Source: Woods & Pool Economics, Inc.

* Transportation, Communications and Utilities.

** Finance, Insurance and Real Estate.

The current earnings figures for Hall County, the State and the Nation are compared in the following Chart.



Source: Woods & Pool Economics, Inc.

* Transportation, Communications and Utilities.

** Finance, Insurance and Real Estate.

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While farm employment in Hall County is lower than the state and national averages, the earnings reported for this sector exceed the state and national percentages. Many sectors produce earnings that exceed their contribution to the employment percentages. For example in Hall County, manufacturing accounts for 24.38% of the jobs and 28.82% of the earnings. Other sectors contribute more jobs than earnings. Service sector employment accounts for 25.54% of the employment in the County but only 22.50% of the earnings. Sectors that provide a greater percentage of earnings than positions most likely are higher paying jobs. In 2000, Hall County had more than the state and national averages in these higher paying jobs, and fewer in the lower paying sectors. This trend is anticipated to continue in the future. Table 6 illustrates the comparison of employment and earnings by percentage for 2025.

Table 5: Employment and Earnings Percentages 2000

	Hall County		Georgia		United States	
	Employment	Earnings	Employment	Earnings	Employment	Earnings
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Farm	1.23%	1.42%	1.39%	0.98%	1.91%	0.79%
Agricultural Services, Other	1.06%	0.63%	1.13%	0.59%	1.26%	0.69%
Mining	0.22%	0.25%	0.20%	0.27%	0.48%	0.83%
Construction	6.63%	6.95%	6.10%	6.00%	5.68%	5.85%
Manufacturing	24.38%	28.82%	12.63%	14.86%	11.61%	15.93%
T.C.U.*	3.61%	4.65%	6.10%	9.89%	4.88%	6.75%
Wholesale Trade	5.56%	7.01%	5.69%	8.44%	4.58%	6.20%
Retail Trade	14.74%	9.60%	16.80%	8.99%	16.37%	8.87%
F.I.R.E. **	6.50%	6.30%	7.12%	7.57%	7.94%	9.18%
Services	25.54%	22.50%	28.63%	26.77%	31.75%	29.16%
Federal Civilian Government	0.58%	1.14%	1.90%	3.39%	1.68%	3.14%
Federal Military Government	0.59%	0.27%	1.93%	2.06%	1.25%	1.25%
State & Local Government	9.36%	10.46%	10.39%	10.18%	10.62%	11.35%

Source: Woods & Pool Economics, Inc.

* Transportation, Communications and Utilities.

** Finance, Insurance and Real Estate.

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Table 6: Employment and Earnings Percentages 2025

	Hall County		Georgia		United States	
	Employment	Earnings	Employment	Earnings	Employment	Earnings
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Farm	0.67%	0.99%	0.82%	0.79%	1.29%	0.70%
Agricultural Services, Other	0.82%	0.49%	1.16%	0.62%	1.24%	0.67%
Mining	0.18%	0.18%	0.15%	0.18%	0.44%	0.66%
Construction	5.42%	5.29%	5.52%	5.06%	5.40%	5.11%
Manufacturing	22.74%	28.29%	9.97%	12.53%	9.05%	12.69%
T.C.U.*	4.19%	5.43%	5.97%	9.63%	4.58%	6.17%
Wholesale Trade	5.55%	6.25%	5.66%	7.71%	4.52%	5.55%
Retail Trade	15.36%	8.93%	17.76%	8.71%	15.65%	7.70%
F.I.R.E. **	6.58%	7.09%	6.76%	7.82%	7.62%	9.69%
Services	28.21%	26.22%	33.35%	33.73%	37.21%	36.92%
Federal Civilian Government	0.45%	0.84%	1.35%	2.33%	1.31%	2.37%
Federal Military Government	0.45%	0.21%	1.42%	1.53%	0.97%	0.97%
State & Local Government	9.37%	9.79%	10.10%	9.37%	10.71%	10.79%

Source: Woods & Poole Economics, Inc.

2.1.2.2: Personal Income by Type

The following tables illustrate the historic and future projected personal income distributions for Hall County.

Table 7: Personal Income by Type Historic (Hall County)

	Personal Income by Type				
	1980	1985	1990	1995	2000
Total (1996 \$)	\$1,150,310,000	\$1,528,610,000	\$1,872,090,000	\$2,345,500,000	\$3,109,090,000
Wages & Salaries (1996 \$)	\$674,337,000	\$862,379,000	\$1,068,520,000	\$1,338,200,000	\$1,772,390,000
Other Labor Income (1996 \$)	\$78,477,000	\$107,046,000	\$141,879,000	\$179,144,000	\$189,106,000
Proprietors Income (1996 \$)	\$106,098,000	\$151,176,000	\$165,931,000	\$189,951,000	\$277,320,000
Dividends, Interest, & Rent (1996 \$)	\$162,500,000	\$264,610,000	\$363,607,000	\$402,950,000	\$574,998,000
Transfer Payments to Persons (1996 \$)	\$132,144,000	\$158,322,000	\$199,674,000	\$300,453,000	\$355,134,000
Less: Social Ins. Contributions (1996 \$)	\$39,947,000	\$59,939,000	\$81,232,000	\$105,781,000	\$135,913,000
Residence Adjustment (1996 \$)	\$36,701,000	\$45,019,000	\$13,711,000	\$40,584,000	\$76,059,000

	Personal Income by Type (%)				
	1980	1985	1990	1995	2000
Total (1996 \$)	100.00%	100.00%	100.00%	100.00%	100.00%
Wages & Salaries (1996 \$)	58.62%	56.42%	57.08%	57.05%	57.01%
Other Labor Income (1996 \$)	6.82%	7.00%	7.58%	7.64%	6.08%
Proprietors Income (1996 \$)	9.22%	9.89%	8.86%	8.10%	8.92%
Dividends, Interest, & Rent (1996 \$)	14.13%	17.31%	19.42%	17.18%	18.49%
Transfer Payments to Persons (1996 \$)	11.49%	10.36%	10.67%	12.81%	11.42%
Less: Social Ins. Contributions (1996 \$)	3.47%	3.92%	4.34%	4.51%	4.37%
Residence Adjustment (1996 \$)	3.19%	2.95%	0.73%	1.73%	2.45%

Source: Woods & Poole Economics, Inc.

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Table 8: Personal Income by Type Projected (Hall County)

Personal Income by Type					
	2005	2010	2015	2020	2025
Total (1996 \$)	\$3,536,600,000	\$3,971,170,000	\$4,420,650,000	\$4,886,250,000	\$5,368,920,000
Wages & Salaries (1996 \$)	\$2,024,180,000	\$2,272,530,000	\$2,523,220,000	\$2,776,020,000	\$3,030,240,000
Other Labor Income (1996 \$)	\$213,098,000	\$236,077,000	\$258,636,000	\$280,732,000	\$302,279,000
Proprietors Income (1996 \$)	\$312,347,000	\$347,256,000	\$381,776,000	\$415,694,000	\$448,836,000
Dividends, Interest, & Rent (1996 \$)	\$652,532,000	\$735,512,000	\$823,855,000	\$917,382,000	\$1,015,830,000
Transfer Payments to Persons (1996 \$)	\$410,963,000	\$474,852,000	\$547,877,000	\$631,508,000	\$727,451,000
Less: Social Ins. Contributions (1996 \$)	\$161,456,000	\$188,583,000	\$216,817,000	\$245,827,000	\$275,212,000
Residence Adjustment (1996 \$)	\$84,937,000	\$93,530,000	\$102,108,000	\$110,744,000	\$119,506,000

Personal Income by Type (%)					
	2005	2010	2015	2020	2025
Total (1996 \$)	100.00%	100.00%	100.00%	100.00%	100.00%
Wages & Salaries (1996 \$)	57.24%	57.23%	57.08%	56.81%	56.44%
Other Labor Income (1996 \$)	6.03%	5.94%	5.85%	5.75%	5.63%
Proprietors Income (1996 \$)	8.83%	8.74%	8.64%	8.51%	8.36%
Dividends, Interest, & Rent (1996 \$)	18.45%	18.52%	18.64%	18.77%	18.92%
Transfer Payments to Persons (1996 \$)	11.62%	11.96%	12.39%	12.92%	13.55%
Less: Social Ins. Contributions (1996 \$)	4.57%	4.75%	4.90%	5.03%	5.13%
Residence Adjustment (1996 \$)	2.40%	2.36%	2.31%	2.27%	2.23%

Source: Woods & Poole Economics, Inc.

Table 9: Personal Income by Type Comparison Over Time

	Hall County		Georgia		United States	
	2000	2025	2000	2025	2000	2025
Total (1996 \$)	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Wages & Salaries (1996 \$)	57.01%	56.44%	61.18%	60.92%	57.51%	58.11%
Other Labor Income (1996 \$)	6.08%	5.63%	6.84%	6.28%	6.37%	5.98%
Proprietors Income (1996 \$)	8.92%	8.36%	8.65%	8.19%	8.51%	8.17%
Dividends, Interest, & Rent (1996 \$)	18.49%	18.92%	16.80%	16.34%	18.92%	18.50%
Transfer Payments to Persons (1996 \$)	11.42%	13.55%	11.13%	12.25%	13.05%	14.48%
Less: Social Ins. Contributions (1996 \$)	4.37%	5.13%	4.49%	5.33%	4.37%	5.24%
Residence Adjustment (1996 \$)	2.45%	2.23%	-0.11%	1.35%	0.00%	0.00%

Source: Woods & Poole Economics, Inc.

2.1.2.3: Employment by Occupation

The following two tables describe the employment by occupation of Hall County as a whole and the City of Gainesville.

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Table 10: Hall County, GA: Employment by Occupation

	1990	2000
TOTAL All Occupations	49,052	66,587
Executive, Administrative and Managerial (not Farm)	4,802	7,565
Professional and Technical Specialty	5,059	9,945
Technicians & Related Support	1,548	NA
Sales	5,525	7,493
Clerical and Administrative Support	6,419	8,438
Private Household Services	168	NA
Protective Services	956	NA
Service Occupations (not Protective & Household)	4,532	7,130
Farming, Fishing and Forestry	1,305	596
Precision Production, Craft, and Repair	7,443	11,198
Machine Operators, Assemblers & Inspectors	5,927	8,507
Transportation & Material Moving	2,140	4,796
Handlers, Equipment Cleaners, helpers & Laborers	3,228	NA

Source: U.S. Bureau of the Census

Table 11: Gainesville city: Employment by Occupation

	1990	2000
TOTAL All Occupations	8,741	11,019
Executive, Administrative and Managerial (not Farm)	1,130	1,220
Professional and Technical Specialty	1,305	1,854
Technicians & Related Support	311	NA
Sales	1,171	1,258
Clerical and Administrative Support	1,009	968
Private Household Services	76	NA
Protective Services	122	NA
Service Occupations (not Protective & Household)	870	1,212
Farming, Fishing and Forestry	194	153
Precision Production, Craft, and Repair	989	2,211
Machine Operators, Assemblers & Inspectors	740	1,148
Transportation & Material Moving	212	817
Handlers, Equipment Cleaners, helpers & Laborers	612	NA

Source: U.S. Bureau of the Census

The following table compares the percentages of the working population in each occupation for Gainesville and Hall County to the same information for the state and nation. The information is presented for 1990 and 2000.

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Table 12: Employment by Occupation Percentages Comparison

	Gainesville	Hall County	Georgia	United States
TOTAL All Occupations	100.00%	100.00%	100.00%	100.00%
Executive, Administrative and Managerial (not Farm)	12.93%	9.79%	12.26%	12.32%
Professional and Technical Specialty	14.93%	10.31%	12.39%	14.11%
Technicians & Related Support	3.56%	3.16%	3.58%	3.68%
Sales	13.40%	11.26%	12.28%	11.79%
Clerical and Administrative Support	11.54%	13.09%	16.00%	16.26%
Private Household Services	0.87%	0.34%	0.51%	0.45%
Protective Services	1.40%	1.95%	1.70%	1.72%
Service Occupations (not Protective & Household)	9.95%	9.24%	9.77%	11.04%
Farming, Fishing and Forestry	2.22%	2.66%	2.20%	2.46%
Precision Production, Craft, and Repair	11.31%	15.17%	11.86%	11.33%
Machine Operators, Assemblers & Inspectors	8.47%	12.08%	8.50%	6.83%
Transportation & Material Moving	2.43%	4.36%	4.60%	4.08%
Handlers, Equipment Cleaners, helpers & Laborers	7.00%	6.58%	4.34%	3.94%

	2000			
	Gainesville	Hall County	Georgia	United States
TOTAL All Occupations	100.00%	100.00%	100.00%	100.00%
Executive, Administrative and Managerial (not Farm)	11.07%	11.36%	14.03%	13.45%
Professional and Technical Specialty	16.83%	14.94%	18.68%	20.20%
Technicians & Related Support	NA	NA	NA	NA
Sales	11.42%	11.25%	11.64%	11.25%
Clerical and Administrative Support	8.78%	12.67%	15.14%	15.44%
Private Household Services	NA	NA	NA	NA
Protective Services	NA	NA	NA	NA
Service Occupations (not Protective & Household)	11.00%	10.71%	11.57%	12.01%
Farming, Fishing and Forestry	1.39%	0.90%	0.64%	0.73%
Precision Production, Craft, and Repair	20.07%	16.82%	9.02%	8.49%
Machine Operators, Assemblers & Inspectors	10.42%	12.78%	10.83%	9.45%
Transportation & Material Moving	7.41%	7.20%	6.63%	6.14%
Handlers, Equipment Cleaners, helpers & Laborers	NA	NA	NA	NA

Source: U.S. Bureau of the Census.

The historic average weekly wages by sector for Hall County employees is listed below.

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Table 13: Hall County: Average Weekly Wages

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
All Industries	\$355	\$378	\$391	\$409	\$417	\$420	\$435	\$454	\$474	\$497	\$536
Agri, Forestry, Fishing	NA	\$332	\$348	\$373	\$377	\$376	\$399	\$416	\$430	\$475	\$472
Mining	NA	NA	NA	\$521	\$587	NA	NA	NA	\$729	\$712	\$647
Construction	NA	\$379	\$392	NA	\$405	NA	NA	NA	NA	NA	NA
Manufacturing	NA	\$410	\$419	\$445	\$471	\$489	\$501	\$518	\$557	\$572	\$596
T.C.U.	NA	\$508	\$534	\$555	\$532	\$538	\$541	\$556	\$570	\$598	\$624
Wholesale	NA	\$454	\$493	\$517	\$522	\$548	\$572	\$603	\$605	\$631	\$654
Retail	NA	\$230	\$236	\$245	\$254	\$255	\$274	\$283	\$294	\$319	\$348
FIRE	NA	\$432	\$462	\$501	\$526	\$556	\$605	\$651	\$656	\$705	\$701
Services	NA	\$370	\$383	\$402	\$393	\$374	\$385	\$404	\$414	\$421	\$503
Federal Gov	NA										
State Gov	NA	NA	NA	NA	NA	NA	\$436	\$517	\$548	NA	\$567
Local Gov	NA	NA	NA	NA	NA	NA	\$455	\$471	NA	\$507	\$513

Source: U.S. Bureau of Labor Statistics FIRE-Finance, Insurance, Real Estate

The following table illustrates the projected population increases in the planning horizon. The County population is expected to more than double with an expected parallel increase in the employment base.

Table 14: Demand-Based Population Projections

Gainesville Population								
1980	1985	1990	1995	2000	2001	2002	2003	2004
15,280	16,583	17,885	20,343	25,578	26,630	28,090	29,662	31,346
2005	2006	2007	2008	2009	2010	2015	2020	2025
33,143	35,052	37,073	39,207	41,453	43,811	57,109	69,561	79,616
Hall County Total Population								
1980	1985	1990	1995	2000	2001	2002	2003	2004
76,101	84,176	95,984	114,815	140,469	142,286	144,142	162,372	171,389
2005	2006	2007	2008	2009	2010	2015	2020	2025
180,970	191,115	201,824	213,096	224,934	237,332	307,089	376,329	437,609

Source: Historic Data: US. Census: Current and Projected: Ross + Associates Demand Analysis, 2003.

As the foundation of much of the plan, consultants performed a *Development Trends and Demand Analysis* for the City and County. The results of this study were used to calibrate the possible development trends and potential population growth within the community. Population and employment forecasts form the backbone of a *Development Trends and Demand Analysis*. By its very nature, a *Development Trends and Demand Analysis* anticipates future growth, and translates that growth in to an estimate of the amount of development that would most likely be

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generated to accommodate it. In the *Population* section of the Comprehensive Plan, the approach and results of the population and employment forecasts are presented.

2.1.3.0: LABOR FORCE

Gainesville and Hall County operate as a regional employment center for northeast Georgia, drawing its labor force from a ten county region consisting of over 580,000 people. In early 2002, the unemployment rate was 3 percent, one of the lowest in the state. The manufacturing, healthcare, agribusiness industry and service sector provide a balanced employment environment for residents in Hall County and the northeast Georgia region. The following tables list the top ten firms by number of employees in Gainesville/Hall County in non-manufacturing, manufacturing, and international businesses.

Top Ten Non-Manufacturing Employers (by number of employees)

Northeast Georgia Medical Center	4000
Hall County Board of Education	2585
Hall County Government	1200
City of Gainesville Government	611
Georgia Department of Transportation	560
City of Gainesville Board of Education	510
Liberty Mutual Insurance	503
Wal-Mart Super Center	450
Lake Lanier Islands	300

Top Ten Manufacturing & Processing Firms (by number of employees)

Fieldale Farms Corporation/Murrayville	1500
ConAgra Poultry Company	1375
Mar-Jac, Inc.	1259
Kubota Manufacturing of America	1200
King's Delight, Ltd.	950
Fieldale Farms/Gainesville	750
Peachtree Doors and Windows	750
Wrigley Manufacturing Company, LLC	720
Koch Foods	600
Siemens Automotive	550
Beaulieu of America	400

Top Ten International Firms (number of employees)

Kubota Manufacturing of America (Japan)	1200
Siemens Automotive (Germany)	550
Beaulieu of America (Belgium)	400
ZUA Autoparts, Inc. (Germany and Japan)	350
Indalex of America, Inc. (United Kingdom)	300
SKF USA, Inc. (Sweden)	280
Merial Select, Inc. (France)	260
ZF Industries, Inc. (Germany)	225
Hayes-Lemmerz Intn'l, Inc. (Germany and US)	215
Stock Gamco, Inc. (Netherlands)	160

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Industry Mix, 2001	Percent
Services	29.2
Manufacturing	29.2
Government	12.8
Retail Trade	10.8
Construction	5.1
Wholesale Trade	4.7
Finance, Insurance and Real Estate	4.3
Transportation and Warehousing	2.5
Agriculture, Forestry and Fishing	1.1
Utilities	0.2
Mining	0.1

The international firm with the most employees in Gainesville and Hall County is Kubota Manufacturing. The company is indicative of the burgeoning industrial development in the City of Gainesville and Hall County. In 1989 the company started with 36 employees in Gainesville. The company has grown to 1,200 employees and has more than 600,000 square feet of manufacturing space in two buildings, located on a 150-acre site in Industrial Park North. Kubota's Gainesville facility generates more than \$250 million in sales, and has been key to attracting four other companies to the area, which together have created an additional 100 jobs.

Additional, labor statistics by year from the Georgia Department of Labor are listed below.

Table 15: Hall County: Labor Statistics

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Labor Force	52,773	52,720	55,133	58,734	62,551	63,149	64,562	67,600	70,127	71,482	74,460
Employed	49,822	50,183	51,798	56,110	60,215	60,880	62,469	65,575	68,077	69,634	72,727
Unemployed	2,951	2,537	3,335	2,624	2,336	2,269	2,093	2,025	2,050	1,848	1,733
Unemployment Rate	5.6%	4.8%	6.0%	4.5%	3.7%	3.6%	3.2%	3.0%	2.9%	2.6%	2.3%

Source: Georgia Department of Labor

The labor force participation of both the City of Gainesville and Hall County for 1990 and 2000 respectively are listed below.

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Table 16: Labor Force Participation

	City of Gainesville		Hall County	
	1990	2000	1990	2000
TOTAL Males and Females	14,136	19,840	73,547	105,772
In Labor Force	9,219	11,643	51,340	69,294
Civilian Labor Force	9,206	11,618	51,251	69,237
Civilian Employed	8,741	11,019	49,052	66,587
Civilian Unemployed	465	599	2,199	2,650
In Armed Forces	13	25	89	57
Not in Labor Force	4,917	8,197	22,207	36,478
TOTAL Males	6,361	9,845	35,772	53,527
Male In Labor Force	4,862	6,707	28,473	39,534
Male Civilian Labor Force	4,849	6,682	28,400	39,477
Male Civilian Employed	4,618	6,346	27,209	38,133
Male Civilian Unemployed	231	336	1,191	1,344
Male In Armed Forces	13	25	73	57
Male Not in Labor Force	1,499	3,138	7,299	13,993
TOTAL Females	7,775	9,995	37,775	52,245
Female In Labor Force	4,357	4,936	22,867	29,760
Female Civilian Labor Force	4,357	4,936	22,851	29,760
Female Civilian Employed	4,123	4,673	21,843	28,454
Female Civilian Unemployed	234	263	1,008	1,306
Female In Armed Forces	0	0	16	0
Female Not in Labor Force	3,418	5,059	14,908	22,485

Source: U.S. Bureau of the Census

The following table compares the labor force and unemployment with the surrounding counties. Hall County has one of the lower unemployment rates in the entire region. This is in part due to the established manufacturing and agricultural industries. The local opportunities for education and technical training are also instrumental in supporting the diverse workforce.

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Table 17: Regional Labor Force Comparison

	Labor Force	Employed	Unemployed	Rate %
Hall	75,161	72,949	2,212	2.9
Banks	6,353	6,112	241	3.8
Barrow	22,077	21,091	986	4.5
Dawson	9,578	9,333	245	2.6
Forsyth	56,315	55,035	1,280	2.3
Gwinnett	349,473	339,138	10,335	3.0
Habersham	15,648	14,945	703	4.5
Jackson	22,488	21,602	886	3.9
Lumpkin	10,748	10,500	248	2.3
White	9,136	8,834	302	3.3
Hall Area	576,977	559,539	17,438	3.3
Georgia	4,131,569	3,966,348	165,221	4.0
U.S.	141,815,000	135,073,000	6,742,000	4.8

Source: Georgia Department of Labor, 2001 Annual Averages

The following table compares the number of Hall County employees who worked in the County in 1990 and 2000. The second table compares Hall County's resident employment with the remainder of the region. Hall County has the highest percentage of residents working within the County of any County listed.

Table 9: Hall County, GA: Labor Force by Place of Work

	1990	2000
Worked in County of Residence	37,607	46,680
Worked outside county of Residence	10,295	18,319

Source: U.S. Bureau of the Census

Table 18: Place of Work Comparison

County of Residence	Total Working Population 16+ years	Total Working in County of Residence	Percent Working in County of Residence	Total Working out of County of Residence	Percent Working out of County of Residence
Hall	65,402	46,680	71.4	18,722	28.6
Banks	6,928	1,721	24.8	5,207	75.2
Barrow	22,616	7,751	34.3	14,865	65.7
Dawson	8,082	2,786	34.5	5,296	65.5
Forsyth	51,224	21,039	41.1	30,185	58.9
Gwinnett	309,797	169,000	54.6	140,797	45.4
Habersham	16,482	11,308	68.6	5,174	31.4
Jackson	19,132	7,960	41.6	11,172	58.4
Lumpkin	10,118	5,191	51.3	4,927	48.7
White	9,463	4,951	52.3	4,512	47.7

Source: US Census Bureau – 2000 Decennial Census

2.1.4.0. LOCAL ECONOMIC DEVELOPMENT RESOURCES

2.1.4.1: Greater Hall Chamber of Commerce

The Greater Hall Chamber of Commerce works to promote the City and County for economic development. The Greater Hall Chamber's Economic Development division supports the continued development of industrial parks by public private partnerships, including government entities and private companies. The city of Gainesville, with its six industrial parks, and the city of Oakwood, with its first industrial park, has proven track records, which serve as a model for others. Having first class industrial parks with speculative buildings is critical to attracting new industry.

The Greater Hall Chamber of Commerce maintains information on available sites and buildings throughout the area. There are over 2,000 acres of sites available as well as 16 industrial and business parks in Hall County and the municipalities including the Oakwood South Industrial Park (248 acres), Gainesville Industrial Park South (171 acres), Industrial Park West (225 acres), Industrial Park North (216 acres), Airport Industrial Park (16 acres), Atlas Circle Business Park (62 acres), Centennial Park (7 acres) and Tanners Creek Industrial Park.

The Chamber supports the State of Georgia and its efforts to increase economic development through the Georgia Department of Industry, Trade and Tourism; Yamacraw; Georgia QuickStart; the Georgia Department of Labor; Intellectual Capital Partnership Program; and Georgia Research Alliance. In addition, the Greater Hall Chamber of Commerce offers programs throughout the year that assist businesses in identifying resource maximization and methods of reducing costs.

2.1.4.2: Gainesville-Hall County Convention and Visitors Bureau

The Gainesville/Hall County Convention and Visitors Bureau (CVB) was founded in 1992 and has as its mission to generate, maintain and expand business and leisure tourism through promotion and marketing of the Hall County area. It primarily functions to provide destination marketing and sales for the Gainesville/Hall County area. The tourism industry generates \$180 million dollars per year in Hall County. Local tax revenue generated by tourism in Gainesville and Hall County amounts to \$5,180,962. In addition, there are 140 business equivalents supported by tourism in Gainesville and Hall County.

Gainesville/Hall County CVB works with a number of organizations including: Gainesville-Hall Chamber of Commerce, Arts Council, Canoe and Kayak, Rowing, Quinlen, Georgia Mountains Museum, Main Street Gainesville, Gainesville Parks and Recreation, Hall County Parks and Leisure Services, Gainesville Symphony, Georgia Winegrass Association, Elachee Nature Center, Georgia Hospitality and Travel Association, Southeast Tourism Society, Georgia Association of Meeting Planners, Georgia Society of Association Executives, Society of Governmental Meeting Planners.

The Gainesville/Hall County Convention and Visitors Bureau has set forth goals in its Business Plan to fulfill its mission. These goals include:

1. CVB will sell and service the corporate/government/education/association markets.
2. CVB will sell and service the sports/military/reunion/fraternity market
3. The CVB will raise the visibility of Hall County as a tourism destination through marketing efforts targeting the major attractions and events.
4. CVB will educate the community about CVB activities, thereby obtaining new members
5. CVB will develop group tour and wedding markets.
6. CVB will develop and research potential tourism products.
7. CVB will work with legislative issues that involve the tourism industry.

2.1.4.3: Education and Training Opportunities

A component of an economically prosperous County is the recognition of the importance of training the local workforce. Brenau University, Gainesville College and Lanier Technical College, our three local institutions of higher learning, as well as other colleges offering classes in Hall County, support a growing and diverse employment base. These schools are a critical part of the local economy and institutions like the Chamber support increased state funding to allow for their growth. The following tables describe general education statistics for the City of Gainesville and Hall County.

Table 19: Education Statistics

Gainesville City: Education Statistics

	1995	1996	1997	1998	1999	2000	2001
H.S. Graduation Test Scores (All Components)	92%	83%	69%	74%	65%	66%	63%
H.S. Dropout Rate	8.60%	8.40%	6.90%	7.40%	8%	6.70%	5.90%
Grads Attending Georgia Public Colleges	28.40%	43.90%	44.70%	47.10%	48.30%	NA	NA
Grads Attending Georgia Public Technical Schools	3.70%	8.30%	0.60%	2.30%	1.70%	7.70%	NA

Hall County: Education Statistics

Category	1995	1996	1997	1998	1999	2000	2001
H.S. Graduation Test Scores (All Components)	89%	82%	72%	74%	72%	68%	64%
H.S. Dropout Rate	10.80%	11.80%	7.20%	4.60%	4.80%	5.50%	5.40%
Grads Attending Georgia Public Colleges	30.90%	41.00%	39.70%	37.40%	38.60%	NA	NA
Grads Attending Georgia Public Technical Schools	7.10%	9.90%	7.80%	5.20%	7.60%	8.90%	NA

Source: Georgia Department of Education

Gainesville College (a branch of the University System of Georgia) is a community-oriented two-year school offering associate degrees, as well as, career degrees in cooperation with Lanier Technical College. Gainesville College opened in 1964 and has over 3,500 students. The campus is located in Oakwood and draws students from Hall County and the surrounding northeast Georgia region. Gainesville College offers over 30 fields of study leading to the Associate of Arts, Associate of Science, and Applied Science degrees. Over 85 percent of Gainesville College alumni live and work in northeast Georgia.

Brenau University has been a part of Hall County's educational community since 1878. The main campus is located in the heart of Gainesville on 57 acres. The university offers majors in over 30 fields are available to both residential and commuting students through the Women's college. There are also evening and weekend programs, offering master's programs in business, education and healthcare. The university currently enrolls more than 2,500 students.

Lanier Technical College offers 27 programs of study in addition to tech prep and school-to-work programs to facilitate the transition from high school to post-secondary education to joining the work force. Georgia's Quick Start Program, a national job training program implemented locally by Lanier Tech, trains employees in the skills of positive interaction with customers, the operation of complex computer systems and intercommunication, as well as supporting new and expanding industries with plant startups and expansion plans. Training in industries including Information Technology, Manufacturing, and Warehouse Distribution. The campus is located just south of Gainesville on a 27-acre site. The school currently has over 2,000 students.

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The Economic Development Institute at Georgia Tech has a regional office in Gainesville and supports new and existing industries in total quality management, ISO 9000, productivity improvement and computer application, among other areas. The University of Georgia's Small Business Outreach Services, located in Gainesville, assists prospective business owners in the areas of forecasting business results, market analysis and obtaining the information necessary to start up a new business.

The Greater Hall Chamber of Commerce utilizes the QuEST (Quality Education Strategy Team) Youth Apprenticeship Program students participate in structured school and work-based learning, leading to a diploma, post-secondary credentials and a certificate of occupational skills. More than 200 high school students have been placed in apprenticeship positions in local industries since the program began in 1995.

The Chamber also provides "Career Speakers" from the business community who speak in schools to assist students in exploring career opportunities. The Chamber also coordinates the "Partners in Education Program". This serves the Gainesville City School System and the Hall County School System. It directly impacts the development of a qualified workforce in Gainesville Hall County by 1) Increasing career awareness, 2) Increasing students' awareness of the free enterprise system, 3) Providing firsthand experience with models of success, and 4) Providing on-the-job opportunities.

2.2.0.0: ASSESSMENT OF CURRENT AND FUTURE NEEDS

2.2.1.0: INFRASTRUCTURE

Infrastructure provision plays a critical role in attracting economic development activities in the County. The City of Gainesville contains much of the commercial and industrial activity due to its ability to provide sewer service. The Cities of Flowery Branch, Buford, Braselton, and Oakwood also contain commercial development due to their provision of sewer service.

The County is currently implementing a plan to construct sewer service along the SR 365 corridor north of Gainesville. The project is a joint venture between the City of Gainesville and the County. The cost of the project is approximately \$15 million dollars primarily to provide sewer to attract commercial, industrial, and business to Hall County. The proposal involves Hall County constructing trunk lines along the SR 365 corridor. The lines are dedicated for Commercial and Industrial (C & I) use (85%) with minimal residential tap-on allocations (15%). The City of Gainesville will provide operation, capacity and administration of the corridor.

This project is reflected in the proposed land use designations along the SR 365 corridor. The proposed land use designations along the roadway are industrial and a newly proposed “Mixed-Use” category. The Mixed-Use category includes areas containing or planned for a mixture of light industrial and office-based employment, retail activities, institutional uses and residential development. The categories are:

Office/Business Parks – Anticipated to make up approximately 65 percent of this land area providing high quality employment areas such as offices, employment based institutions, “flex” office/warehouses, and research and development facilities, with limited light assembly and warehousing.

Limited Retail – Anticipated making up approximately 25 percent of this land area providing support retail for business parks, neighborhood office and service uses, and specialty retail for surrounding land uses.

Residential – Approximately 10 percent of this land area is anticipated to provide supporting residential development in single family, townhouse, or multi-family developments of up to 12 units per acre. Such residential development should be in response to commercial and industrial development, and restricted to the Gainesville sewer service districts.

The County has also entered into an agreement with the City of Flowery Branch to provide commercial sewer capacity in south Hall County. The agreement has been reached to provide Hall County with the opportunity to bring commercial, industrial, business and employment opportunities to Hall County. Hall County will build and maintain sewer lines in five major corridors: I-985 south of Gainesville, Atlanta Highway, Spout Springs Road, Hog Mountain Road (south to Friendship Road and north to Atlanta Highway), and McEver Road. The city of Flowery Branch will provide waste treatment.

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2.2.2.0: COMMERCIAL INFLUENCES

The most significant regional commercial center outside of the County is the Mall of Georgia located in Gwinnett County just south of the Hall County line, which consists of 1,786,000 square feet of commercial development. More than 15 million shoppers visit the Mall of Georgia each year, and the mall attracts a significant amount of dollars from Hall County residents.

2.2.3.0: NORTHEAST GEORGIA MEDICAL CENTER

The Northeast Georgia Medical Center has developed a master facility plan, which will guide the organization's development for the next 20 to 25 years. Enhancements to the Main Campus include the repositioning of the main entrance from Spring Street to South Enota Drive/Downey Boulevard for the construction of a new patient bed tower. The tower is planned to be five stories with the capability of adding an additional three stories in the future. Plans also include a loop road around the hospital to provide improved parking and access to the hospital.

In order to serve a rapidly growing population in south Hall, the Medical Center purchased 52 acres on the corner of Friendship Road and Highway 13. The Medical Center plans to develop a freestanding outpatient center by 2005 that will provide the following services: comprehensive imaging; urgent care; cardiac non-invasive diagnostics; outpatient physical, speech and occupational therapy; and laboratory and routine testing. An inpatient community hospital is scheduled to be built by 2010.

The projected cost of the 10-year master plan exceeds \$400 million. With expansion comes a need to assess staffing needs. The Northeast Georgia Health System (NGHS) has recently commissioned a physician manpower study for the Health System's 15-county service area in Northeast Georgia to anticipate physician need through 2005. Recruitment and retention of healthcare personnel has become a focus for the entire organization. NGHS also works with high schools and area colleges and technical schools to educate their students. The Hall County population is expected to increase at a steady rate of over the 20-year planning horizon. The master plan developed by NGHS is in large part due to the expected population increase especially in south Hall County.

2.2.4.0: GAINESVILLE MIDTOWN PLAN

The Midtown area is comprised of approximately 300 acres bounded by Jesse Jewell Parkway, Queen City Parkway, E.E. Butler Parkway and the Norfolk-Southern rail line. Midtown was once a vibrant part of Gainesville, centered around the railroad and its associated businesses. Today, Midtown is characterized by blighted housing, incompatible land uses, unscreened outdoor storage for businesses, traffic, crime and a lack of green space. Despite these drawbacks, the community believes that Midtown has the potential for significant change.

Citizens envision a thriving mixed-use area with tree-lined streets, trails and parks that would attract residents and visitors to the area. Possible opportunities include renovating the railroad depot, establishing an entertainment district, converting the CSX rail lines into a greenway, installing streetscaping along key streets, providing mixed-income housing and protecting some of the area's valuable historic resources.

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It is important to note that the City's method of redeveloping Midtown is to make strategic public investments in order to attract private redevelopment of property. The City does not plan to get in the business of redeveloping property.

The first public investment the City plans to make in Midtown is converting the CSX rail line into a greenway and building a park in the area. The creation of a greenway would not only have a positive impact on Midtown, but would benefit the entire City. A greenway in Midtown would greatly improve the aesthetic character of the area and would provide an alternative mode of transportation, recreational opportunities and pedestrian connections to the downtown square, the Elachee trail system and the Rock Creek greenway.

2.2.5.0: INFILL AND REDEVELOPMENT

As the City of Gainesville continues to mature there will be additional redevelopment opportunities in some of the City's commercial areas. Infill development within the city will be designed to be compatible with existing uses with respect to use, scale, and size. The City will utilize guidelines to govern the redevelopment of infill property to protect neighborhoods and maintain the existing character of the community.

Gainesville/Hall County continues to seek economic diversity and opportunity through cooperation with the cities and economic agencies. Hall County is positioned to accommodate the business industry while maintaining its character through thoughtful, well-planned development. The County's proximity to Atlanta and the appeal of Lake Lanier and the north Georgia mountains will continue to draw the attention of the business and development community. Developing a better-balanced tax base and providing varied employment opportunities are paramount to strengthening the economic structure of the County.

2.2.6.0: EFFICIENT PROVISION OF INFRASTRUCTURE

The proposed future land use designation is designed to consider the feasibility of infrastructure provision. Both residential and commercial development is directed to areas that can be efficiently served by existing or planned infrastructure. The enhanced office, commercial, and industrial designated areas are strategically located along major road corridors. The land use pattern seeks to support economic development while providing ample market flexibility.

2.2.7.0: EXISTING AND FUTURE DEVELOPMENT

Gainesville/Hall County's economic development strategy entails sustaining existing development and working collaboratively to establish new business opportunity. Gainesville/Hall County can develop standards that will attract businesses, which are sensitive to the community character, natural environment, and complement the existing business community. These tenets are embodied in the following Economic Development goals and objectives.

2.3.0.0: ECONOMIC DEVELOPMENT GOALS & IMPLEMENTATION

2.3.1.0: GOALS & OBJECTIVES

Goal 1: Balanced Economy

Gainesville and Hall County will have a growing and balanced economy, which equitably benefits all segments of the population, consistent with prudent management of the County's resources.

Objective 1: Gainesville and Hall County will promote the creation of new employment opportunities, both as a way to strengthen the economic base of the community, and to reduce the loss of revenues and the transportation impacts of regional commuting.

Objective 2: Gainesville and Hall County will promote the retention and expansion of existing businesses.

Objective 3: Businesses that generate higher paying jobs with above average wages, will be targeted through economic development efforts.

Objective 4: Gainesville and Hall County will work to put in place the prerequisites for quality economic development, including infrastructure, quality development standards, education and training, and a range of housing types needed to support desired economic growth.

Objective 5: Gainesville and Hall County will promote quality retail uses that encourage the capture of sales tax revenue in Gainesville and Hall County by planning for appropriate locations and adequate land for retail uses.

Objective 6: Gainesville and Hall County will promote tourism as a viable component of the local economy.

Goal 2: Balance of Housing and Jobs

Gainesville and Hall County will have a fiscally healthy balance of employment and housing.

Objective 1: The relative rates of growth of residential and nonresidential uses will be brought into better balance in order that public service costs of growth and the revenues associated with new development can be more efficiently shared.

Objective 2: The relationship of tax revenues from residential and nonresidential uses will be improved through increased commercial, industrial, and business development so that the nonresidential uses are the dominant tax generator.

2.3.2.0: DEVELOPMENT POLICIES

This section sets forth the economic development policies that have been developed during the comprehensive planning process with significant citizen input. These policies are directly related to the goals and objectives set forth above and are an initial, important implementation step, providing greater detail to guide decision-makers.

2.3.2.1: Balanced Economy

Policy 1: The city and county will work together and with other agencies to attract new job-generating businesses with above-average wages. Such efforts will include initiatives such as marketing, infrastructure investment, and making adequate land available for commercial and industrial development.

Policy 2: The city and county will remove unnecessary regulatory and other impediments to the retention and expansion of existing businesses while ensuring that infill and redevelopment are compatible with surrounding neighborhoods.

Policy 3: Both jurisdictions will revise their land development regulations and zoning maps to provide appropriate locations for a range of retail uses (e.g., neighborhood, regional). Quality standards should be put in place to ensure that retail uses enhance the character of the county and protect residential areas.

Policy 4: The city and county will protect natural and cultural resources that provide an essential foundation for tourism and work with the Convention and Visitors Bureau to identify and provide needed infrastructure to support tourism.

2.3.2.2: Balance of Housing and Jobs

Policy 1: The city and county will target capital investments in infrastructure for uses and locations that will provide a better fiscal balance for both jurisdictions.

Policy 2: Both jurisdictions will make adequate land available in appropriate locations for commercial, industrial, and other business developments that are significant local tax generators.

Policy 3: The county and city will revise their development codes to ensure that zone districts are available that accommodate modern commercial and industrial uses in a quality environment.

Policy 4: The county and city will continue their tradition of making available a wide range of housing to accommodate workers in local businesses.

Policy 5: The county will reduce overall residential densities throughout its jurisdiction to ensure a better balance between residential and nonresidential uses.

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2.3.3.0: PROGRAMS

Hall County and the City of Gainesville are committed to undertaking a variety of programs to implement the economic development goals and objectives discussed above. These programs break down into four major categories as noted below. The city and county will cooperate closely with two other agencies that have a major role in economic development, the Greater Hall Chamber of Commerce and the Convention and Visitors Bureau.

1. Regulatory/Growth Management: The city and county have begun to revise their development codes (zoning, subdivision, etc.) to conform to the comprehensive plan. Specifically, for example, the county is creating new commercial and industrial zone districts to accommodate modern businesses uses. Design and development standards are also being drafted to ensure that new development is of high quality and environmentally sensitive. The county will also study changes so that its zoning map better conforms to the future land use map in terms of location of new commercial and industrial development. The city, for example, will revisit their current zoning classifications and lot sizes, and make revisions based on the future land use map and citizen comments to lower densities in established neighborhoods. The time frame for this effort will be 2-4 years.
2. Fiscal/Financial. Both jurisdictions will examine a range of tools to deal with the fiscal impacts of development, including impact fees (which the county already has in place for some facilities/services) and fiscal impact assessment requirements. These tools will help to ensure that new development pays its fair share of the costs of public services and infrastructure necessitated by new growth. The time horizon for this effort is 2-3 years.
3. Capital investment. The city and the county have already initiated a program to provide water and sewer services to areas targeted for business development in the plan. This is a multi-million dollar effort that will help promote appropriate business development and bring a better balance to the property tax base in the county and city. Additionally, the county and city will refrain from making capital investments in rural areas that are not slated for urban/suburban intensity growth. It is estimated that the initial water/sewer construction projects will take 2-4 years. The city and county will also continue to maintain and upgrade facilities utilized by tourists such as the Clarks Bridge Rowing Venue. These programs will have a long-term time frame of at least 5 years.
4. Interagency Cooperation. The city and county will continue to cooperate with and lend financial support to the Greater Hall Chamber of Commerce in its efforts to improve regional marketing. Also, both jurisdictions will work with and support the Convention and Visitors Bureau to promote tourism in the county and to identify and provide needed infrastructure to support tourism. Additionally, they will work with educational institutions in the county to provide support for local businesses through training and other initiatives. These programs are currently underway and will continue throughout the planning period.

While many of these programs will be implemented over an extended period, there are short-term actions that can be taken to ensure that the efforts are begun and demonstrate progress. A short-term work program is set forth in the final section of this element.

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2.3.4.0: IMPLEMENTATION SYSTEMS AND TOOLS

This section sets forth specific systems and tools that will be created or amended during the planning period to achieve the goals and objectives set forth above. They are divided into four broad categories: (1) administrative systems (e.g., site plan review); (2) land development regulations; (3) fiscal and financing tools; and (4) other growth management tools (e.g., urban growth boundaries, concurrency requirements). The tools are keyed to the two broad overarching plan goals for economic development.

2.3.4.1: Balanced Economy/Balance of Housing and Jobs

THE CITY OF GAINESVILLE WILL:

1. Through zoning code and map revisions, increase development densities in selected locations where adequate public facilities are available or planned.
2. Undertake local historic preservation plan that will identify important cultural resources and steps to protect them. Such resources are important tourism assets.
3. Extend public infrastructure and services only into those areas designated for urban/suburban level growth in the comprehensive plan.
4. Examine and eliminate potential unnecessary regulatory impediments in its development and other codes to commercial/industrial infill and redevelopment projects.
5. Explore fiscal impact tools such as impact fees and fiscal assessment requirements.
6. Finish the city's parks master plan to enhance the city's attractiveness for both residents and visitors.
7. Continue to provide financial support for the Greater Hall Chamber of Commerce to maintain and enhance its regional marketing efforts as well as its site selection database for potential businesses.
8. Work with the Convention and Visitors Bureau to continue to promote tourism and visitation, especially to identify and provide needed infrastructure to support tourism.
9. Continue to explore opportunities for cooperation between the business community and educational institutions to realize a closer tie between education and job training.
10. In cooperation with the county, undertake a detailed housing study to identify the best mix and balance of housing relative to economic development objectives.

HALL COUNTY WILL:

1. Revise its Unified Development Code (UDC) to create new commercial and industrial zone districts that will accommodate and attract new business uses. Additionally, standards are being proposed (landscaping, signage, etc.) to ensure that new business development is of high quality and is compatible with surrounding residential areas. Also, the new UDC will include updated resource protection regulations (e.g., tree protection and conservation subdivisions) that will help maintain and protect the character of the county as an important tourism asset. This project is currently underway and scheduled to be completed in 2004.

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2. Undertake changes to the zoning map to ensure it conforms to the future land use map in terms of preferred locations for commercial and industrial development and to reduce land available for urban/suburban density residential development, particularly rural areas.
3. Adopt fiscal impact assessment regulations in the UDC to ensure the county has adequate information about the true costs and benefits of new development.
4. Continue working on parks master plan to enhance quality of life in county and provide additional attractions for tourists as well as residents.
5. Working closely with the City of Gainesville, extend water, sewer, and other public infrastructure to areas designated in the plan for business development (e.g., the Highway 365 Corridor).
6. Continue to provide financial support for the Greater Hall Chamber of Commerce to maintain and enhance its regional marketing efforts as well as its site selection database for potential businesses.
7. Work with the Convention and Visitors Bureau to continue to promote tourism and visitation, especially to identify and provide needed infrastructure to support tourism.
8. Continue to explore opportunities for cooperation between the business community and educational institutions to realize a closer tie between education and job training.
9. In cooperation with the City, undertake a detailed housing study to identify the best mix and balance of housing relative to economic development objectives.
10. Assist with an economic development study for the Highway 365 Corridor in cooperation with the Georgia Tech.

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2.3.5.0: SHORT-TERM WORK PROGRAM

Table 120: Major Gainesville Implementation Actions

Major Actions	Time Frame	Estimated Cost	Responsible Party	Comments
1. Draft county/city preservation plan with implementation tools and seek CLG status	2005	\$50,000	City staff with county assistance	
2. Undertake targeted revisions to city zoning ordinance to implement comprehensive plan; revise standards to encourage infill and reduce unnecessary processing delays	2004-5	\$35,000	City staff + consultant	
3. Implement Midtown and Downtown Plans. Step up code enforcement in Midtown	2004-5	????	City staff	
4. Finish city parks plan. Continue work on county parks plan.	2004-5	NA	City and county staffs	
5. Extend water/sewer to targeted development locations	2004-5	\$15 million	County and city	Seek financial assistance from Georgia. Environmental Facilities Authority
6. Improve regional marketing	2004+	??	Greater Hall Chamber with assistance from city and county	
7. Work with Convention and Visitors Bureau re tourism infrastructure support	2004-5	NA	Convention and Visitors Bureau with county and city staffs	
8. Cooperate with business/ educational community to create closer education/job training ties	2004-6	NA	Greater Hall Chamber, local colleges, city/county staffs	
9. Initiate housing study tied to economic development objectives	2005	NA	Gainesville Nonprofit Development Foundation, city/ county staffs	

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Table 21: Major Hall County Implementation Actions

Major Actions	Time Frame	Estimated Cost	Responsible Party	Comments
1. Comprehensively revise county UDC— business zone districts, quality standards.	2003-4	\$150,000	County staff + consultants	80% completed as of 1/1/04
2. Study revisions to county zoning maps to bring into accord with comprehensive plan regarding location of business development	2004-5	NA	County staff	
3. Draft county/city preservation plan with implementation tools and seek CLG status	2005	\$50,000	City staff with county assistance	
4. Finish city parks plan. Continue work on county parks plan.	2004-5	NA	City and county staffs	
5. Extend water/sewer to targeted development locations	2004-5	\$15 million	County and city	Seek financial assistance from Georgia. Environmental Facilities Authority
6. Improve regional marketing	2004+	??	Greater Hall Chamber with assistance from city and county	
7. Work with Convention and Visitors Bureau re tourism infrastructure support	2004-5	NA	Convention and Visitors Bureau with county and city staffs	
8. Cooperate with business/ educational community to create closer education/job training ties	2004-6	NA	Greater Hall Chamber, local colleges, city/county staffs	
9. Initiate housing study tied to economic development objectives	2005	NA	Gainesville Nonprofit Development Foundation, city/ county staffs	