

Economic Recovery + Resilience

Northeast Georgia COVID-19 Economic Recovery and Resilience Plan

This plan is intended as a companion document to the Northeast Georgia Comprehensive Economic Development Strategy (CEDS)

Athens-Clarke, Barrow, Elbert, Greene, Jackson, Jasper, Madison, Morgan, Newton, Oconee, Oglethorpe, and Walton Counties

Acknowledgements

Stakeholders

Addison Cory | Director of Business and Industry, Lanier Technical College
Amy Pinnell | Community Development and Downtown Director, Town of Braselton
Amy Stone | Director of Economic Development, Oglethorpe County
Anna Strickland | Executive Director, Madison County Chamber of Commerce
Brandon Ashley | Business Development Manager, Jackson EMC
Courtney Bernardi | President, Oconee County Chamber of Commerce
Daniel Dobbins | President/CEO, Development Authority of Elbert County, Elberton, Bowman
David Bernd | Executive Director, Newton County Georgia Industrial Development Authority
David Bradley | President/CEO, Athens Area Chamber of Commerce
Debbie Harper | President, Covington-Newton County Chamber of Commerce
Erin Cook | Director of Marketing/Member Services, Southern Rivers Energy
Gail Harrell | Mayor Pro Tem, City of Monticello
Herschel Arant | Senior VP of Engineer and Power Supply, Central Georgia EMC
Ilka McConnell | Director of Economic Development, Athens-Clarke County
Dr. Irvin Clark | VP of Economic Development, Georgia Piedmont Technical College
Jim Shaw | President/CEO, Jackson County Chamber of Commerce
Karen Robertson | Main Street Director, City of Madison
Katheryn Lookofsky | Regional Economic Development Coordinator, Region 5, Georgia DOL
Kendrick Ward | Main Street Manager, City of Greensboro
Kristen Miller | Senior Regional Project Manager, Region 5, GDEcD
Dr. Kyle Tschepikow | Director for Strategy and Innovation, University of Georgia (UGA)
Leslie Friedman | President, Elbert County Chamber of Commerce
Maddison Dean | Director of Economic Development, City of Winder

Mandi Tanner | President/Executive Director, Monticello-Jasper Chamber of Commerce
Michael Myers | Business Consultant, UGA, Small Business Development Center
Michele Celani | Downtown Development Authority Director, City of Monticello
Michele Yawn | Executive Director/CEO, Winder Housing Authority
Monica Callahan | Director of Planning and Development, City of Madison
Natalie Thomas | Downtown Development/Main Street Manager, City of Commerce
Paul Chambers | Regional Director of External Affairs, AT&T
Rope Roberts | Economic Development Manager, Georgia Power Company
Ruth Ann Miller | Executive Officer, Athens Area Homebuilders Association
Sadie Krawczyk | Economic Development Director, City of Monroe
Sam Young | Economic Development Director, Greene County
Serra Hall | VP of Project Development, Newton County Industrial Development Authority
Steve Caison | Chief Operating Officer, Southern Rivers Energy
Teri Smiley | President, Walton County Chamber of Commerce
Terry Lawler | President, Greene County Chamber of Commerce
Thomas Jennings | President, Barrow County Chamber of Commerce

Northeast Georgia Regional Commission

Burke Walker | Executive Director
Eva Kennedy | Director of Planning & Government Services (PGS)
Noah Roenitz | Economic Resilience Coordinator, PGS Division (Project Lead)

Additional Thanks

NEGRC Planning & Government Services Committee
Georgia Tech Center for Economic Development Research
Georgia Tech Enterprise Innovation Institute

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The Northeast Georgia Regional Commission (NEGRC) serves as the Economic Development District (EDD) for the 12-county Northeast Georgia Region, through the U.S. Economic Development Administration (EDA). In July of 2020, the EDA awarded Coronavirus Aid, Relief, and Economic Security (CARES) Act funding for NEGRC assistance with regional economic recovery and resilience-building efforts. This plan is intended to guide those efforts. The initiatives and guidance provided herein were developed through conversations with local public and private stakeholders, synthesis of state and federal data, and findings from the Northeast Georgia COVID-19 Impact Assessment (December, 2019). This document is consistent with EDA standards and guidelines. It is intended to compliment the vision and initiatives articulated by the Northeast Georgia Comprehensive Economic Development Strategy (CEDS).



Chapter 1

Introduction

The Northeast Georgia Region (pictured below) encompasses 3,260 square miles with an estimated population of 623,792 (ACS 2019). The region is unique with its mix of urban and rural communities, diverse industries, natural features, and cultural resources. The COVID-19 pandemic has taken a toll on communities around the globe, causing overwhelming suffering and wreaking havoc on local economies. During 2020, Northeast Georgia saw unemployment rates reach record highs, infrastructure stretched to its core, and fear and apprehension for an unpredictable future. **As we look ahead, it is important to recognize the determination and adaptability Northeast Georgians have demonstrated throughout this unprecedented time.**

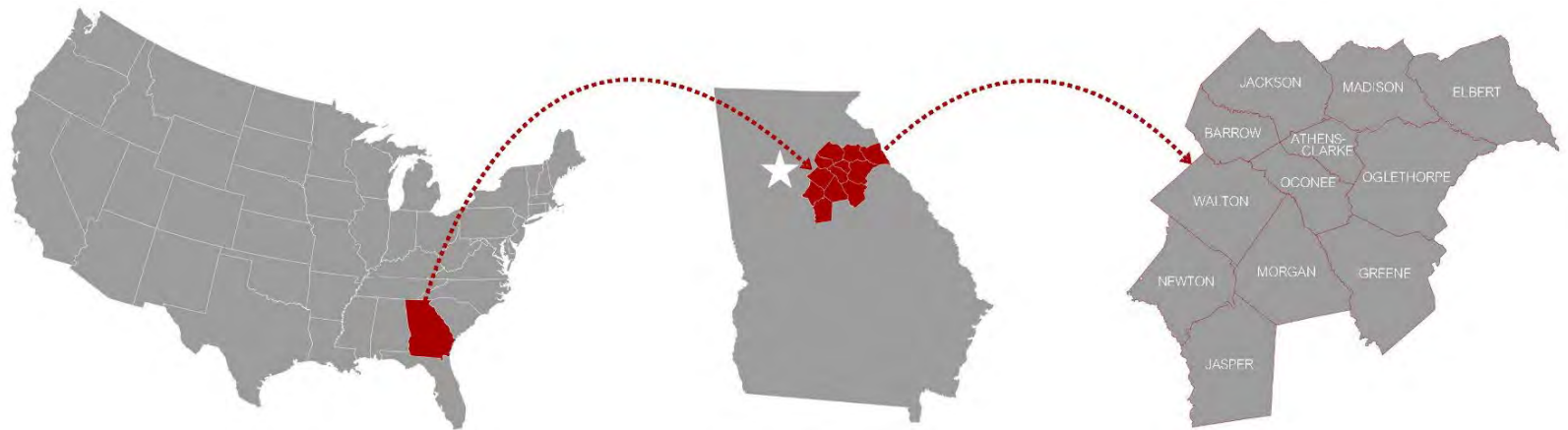


Figure 1. Location Map of Northeast Georgia

Crafting the Plan

The Economic Recovery + Resilience Plan is the result of nine months of public input from nearly 350 representatives from public, private, and non-profit entities. Outreach was primarily performed through one-on-one conversations with local economic development professionals, elected officials, and representatives from public and private entities in key areas of interest (including housing, broadband, and workforce); additional input was gathered through two online surveys conducted in partnership with the GA Tech Center for Economic Development. The input and insights gathered during this process guided the regional economic recovery + resilience strategies and tasks laid out in the Action Plan (described in Chapter 4). The CEDS Action Plan provided additional guidance for strategy and goal development.

Economic Resilience Coordinator

The NEGRC created a new Economic Resilience Coordinator position, tasked with leading development and implementation of the Economic Recovery + Resilience Plan. This position is initially supported by EDA CARES Act funding as part of the NEGRC's expanded staff capacity to provide additional local government assistance.

PGS Committee

The NEGRC Planning and Government Services Committee served as a steering committee during plan development, providing guidance and assisting in refining the goals and initiatives identified in the Action Plan. The 12-member PGS Committee is composed of elected officials and private sector representatives with a variety of backgrounds; they also serve as the region's CEDS monitoring entity, performing annual reviews of progress on the CEDS Action Plan and overseeing the CEDS annual updates.¹

¹ The NEGRC is governed by a Council of county, municipal, private sector, and state representatives. The Planning & Government Services (PGS) Committee of the NEGRC Council is one of four standing committees. On a (typically) monthly basis, the PGS Committee meets to discuss business activity, infrastructure projects, and other planning and government service-related matters within the region. Monthly meetings also provide an opportunity to report matters of importance or interest to the full Council.

Stakeholder Conversations

In July 2020, NEGRC staff began the first of three rounds of one-on-one stakeholder engagement sessions. Initial conversations began with economic development professionals at the county-level, including county and chambers of commerce staff. The second round of stakeholder engagement began in January 2021, following completion of the COVID-19 Impact Assessment, and included a review of the Impact Assessment findings followed by a discussion of current economic and community development needs and opportunities. Targeted stakeholders during the second round of engagement sessions included municipal and county economic development staff and chambers of commerce representatives.

During the first two rounds of engagement sessions, NEGRC staff identified key focal areas related to economic recovery and resilience in the region: workforce, housing, broadband, and the dissemination of accurate information. The third and final round of engagement sought input from key stakeholders within those areas, including state officials, broadband providers, EMC representatives, Housing Authorities, Builders Associations, non-profit groups, technical colleges, and higher education representatives. Over the three rounds of stakeholder input, 38 sessions were held with representatives from all 12 counties, 10 municipalities, and the regional and state-levels.

COVID-19 Impact Assessment

The Northeast Georgia COVID-19 Economic Impact Assessment was developed through a partnership with Georgia Tech CEDR, supported by EDA CARES Act funding. The primary purpose of the Impact Assessment was to examine data between March and September 2020 to identify the early economic effects of the coronavirus pandemic on the Northeast Georgia Region. Findings were used to guide initial identification of key issue areas for this plan to focus on and served as a platform for the later rounds of stakeholder discussions. Refer to Appendix A for the complete COVID-19 Impact Assessment.

Surveys

The NEGRC, Georgia Tech Center for Economic Development Research (CEDR), and Georgia Tech Enterprise Innovation Institute partnered to distribute two online surveys during development of the plan. The first (distributed during September 2020) targeted local government staff, economic development professionals, and elected officials within the Northeast Region. Responses provided valuable insight into current socioeconomic and emergent fiscal challenges, as well as perspectives on business insights and trends within Northeast Georgia communities. Survey respondents represented over 80% of Northeast Georgia communities (41 municipalities and all 12 counties). Results were used to develop the Northeast Georgia COVID-19 Economic Impact Assessment.

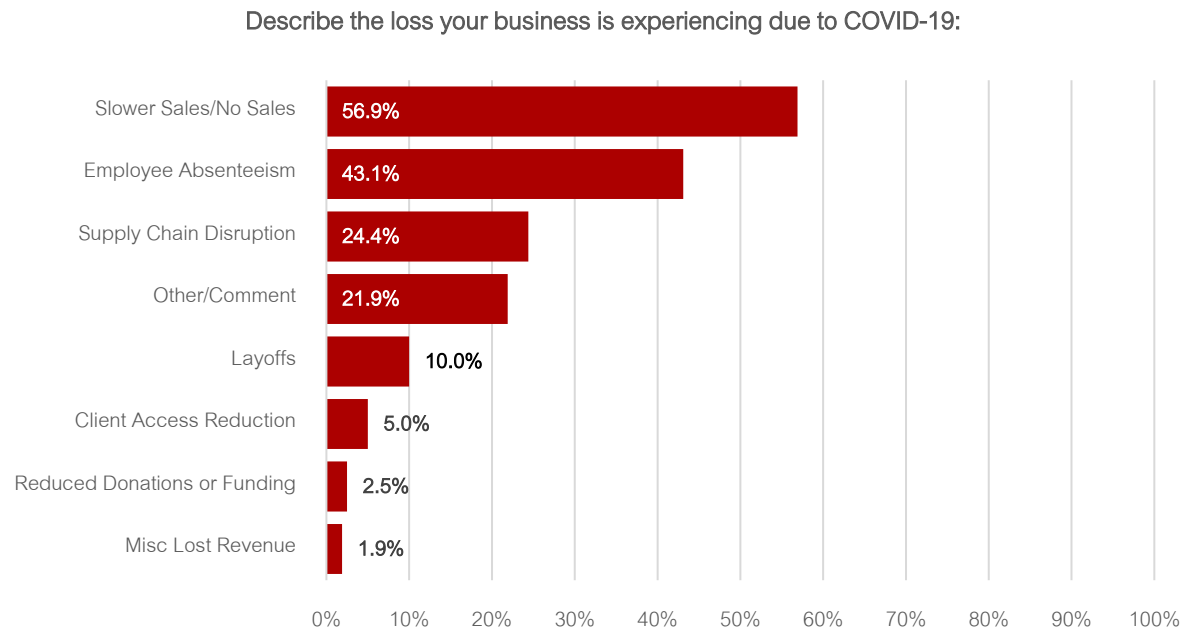
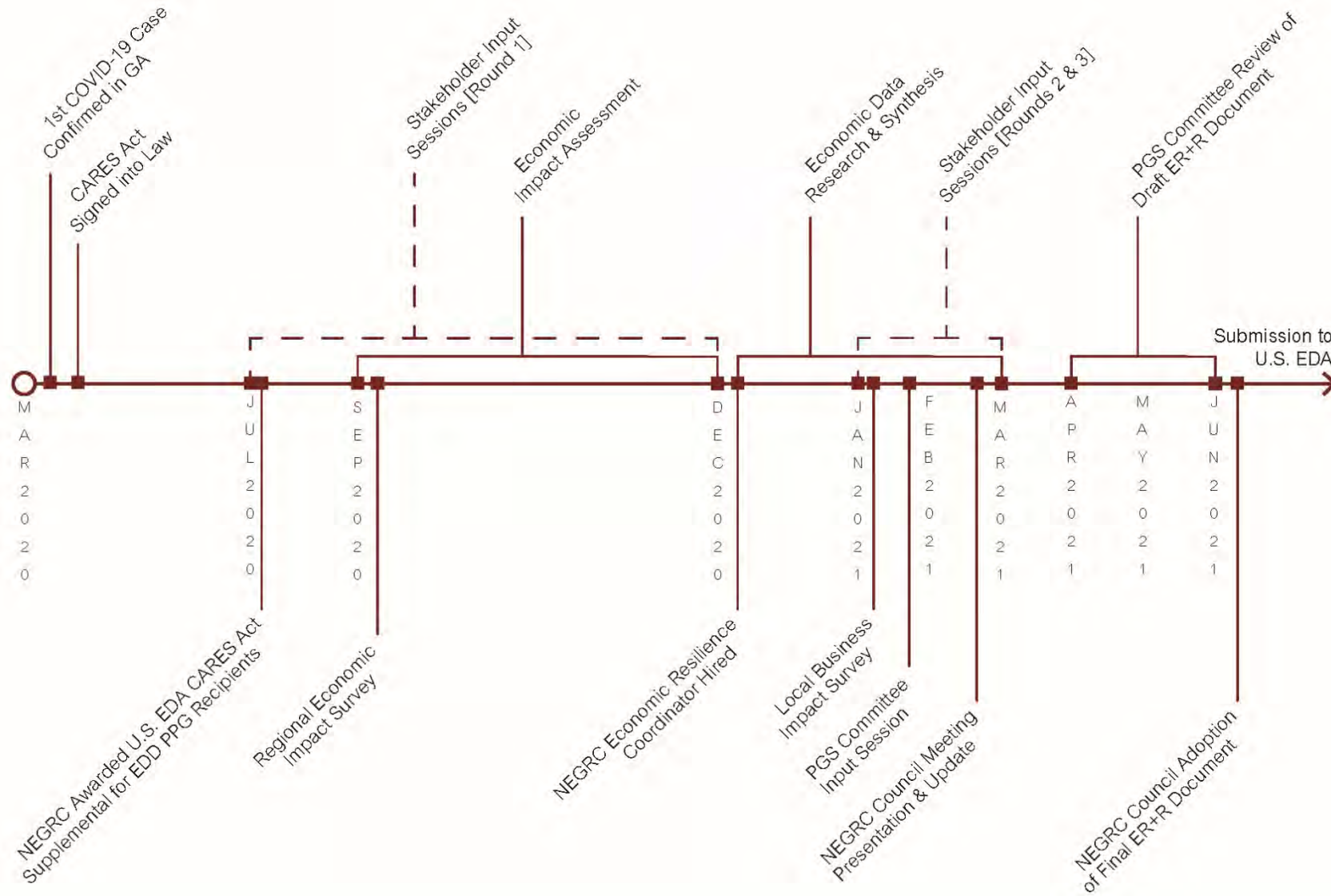


Figure 2. Business Impacts Survey Responses (January 2021)

The second survey was distributed in January 2021, collecting responses primarily from local businesses. 221 businesses responded to the survey with 46% having 10-or-less employees. Survey results provided additional insights for key areas of need.

Timeline





Chapter 2

Where We Are

On March 2nd, 2020, the first case of COVID-19 in Georgia was confirmed; ten days later, the state confirmed its first death as a result of the virus (GDPH). Within three weeks, a public health emergency would be declared, schools and universities would close, and a statewide shelter in place order would be issued (AJC). Fallout from the virus would go on to befall every community in Georgia, and touch every aspect of the state's economy. Fear from increasing restrictions and the public health emergency increased demand for essential goods, while worldwide lockdowns hindered production and logistics, resulting in shortages and supply chain disruptions across the globe.

The National Emergency Declaration in response to the coronavirus pandemic went into place on March 13th, 2020. Governor Brian Kemp declared Georgia's Public Health State of Emergency the next day. Georgia's statewide shelter-in-place went into effect on April 2nd, 2020, providing statewide guidelines in addition to the National Declaration. Essential businesses remained in operation throughout the shutdown; as of April 20th and 24th, additional industries could re-open, with limited capacity and hours of operations. Statewide restrictions were further lifted on May 1st, requiring that only those with heightened susceptibility to COVID-19 (65+ and/or pre-existing health conditions) continue to shelter. Virus infection rates increased drastically during April, plateaued through May and June, and would go on to reach record spikes following the July 4th and winter holidays, with 7-day new case averages peaking at nearly 4,400 and 7,900, respectively (Georgia GIO). The Georgia Department of Labor (GDOL) processed a record 133,820 unemployment claims during the first week of the statewide shutdown (March 22nd-28th, WSBTV). Through 2020, the state processed over 4.5 million initial unemployment claims, a 1,524% increase from 2019 (GDOL). The share of permanent Georgia small business closures increased 32.3% from January 2020 to April 2021 (Womply, Opportunity Insights: Economic Tracker).

As of March 2021, Georgia has recorded over 800,000 cases, 57,000 hospitalizations, and 15,000 deaths due to COVID-19 (GDPH). The Region's cumulative case count is approaching 56,000, and 1,088 Northeast Georgians have been lost due to COVID-19 since the state's first confirmed case (Georgia GIO, see Figure 3).

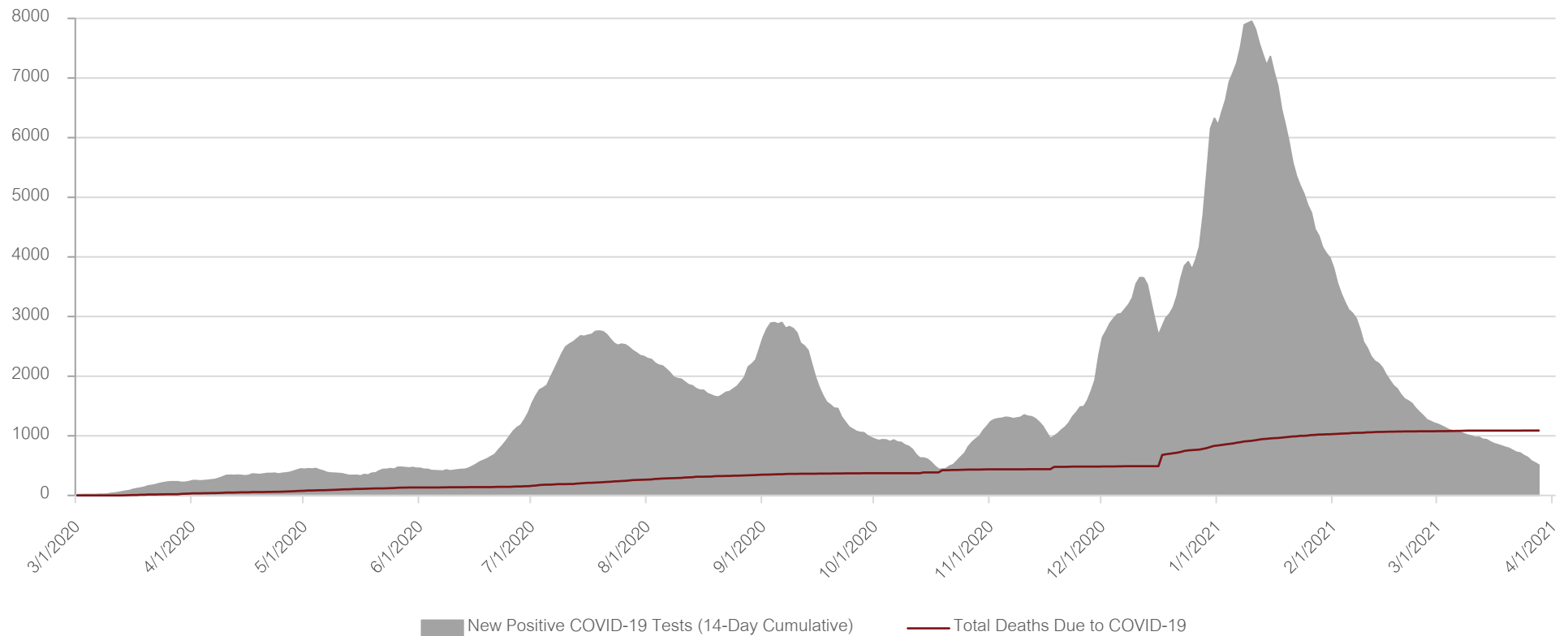


Figure 3. COVID-19 Cases and Deaths in Northeast Georgia

Despite the shut-downs, supply chain interruptions, capacity limitations, and travel restrictions that resulted from the coronavirus pandemic, the level of taxable retail activity in Northeast Georgia grew 3.3% over the first nine months of 2020, compared to 2019 (Appendix A). This increase is primarily due to a combination of the Marketplace Facilitator Law going into effect April 1st of 2020 and the adaptability of businesses (for example, transitioning to online sales, offering curbside or to-go

order pickup, and pivoting production to produce high-demand goods such as hand sanitizer).² In addition, stakeholders throughout the region noted record numbers of building and other permits being pulled, particularly during the latter half of 2020. As a result, most local governments in the region have maintained relatively stable 2020/2021 budgets despite the pandemic. That said, four of the 12 Counties in Northeast Georgia did see decreases in taxable retail activity, reflective of the vulnerability of their local major industries to the effects of the coronavirus pandemic. Areas with high employment in accommodation and food services, retail trade, and arts/ entertainment/ recreation have been more severely impacted and continue to lag behind in economic recovery. The table below identifies the taxable retail activity of each county and their Chmura Economic Vulnerability Index (Chmura Index) score.³

	Clarke	Oconee	Greene	Morgan	Elbert	Newton	Walton	Oglethorpe	Madison	Jasper	Barrow	Jackson	Region (Median)	State (Median)
% Change in Taxable Retail Activity	-4.70	-3.20	-2.70	-0.40	5.10	6.00	6.00	8.60	10.10	10.30	10.60	11.70	3.3	n/a
Chmura Economic Vulnerability Score	112	105	103	116	74	90	93	49	54	72	97	95	94	83

Figure 4. Comparison of Chmura Scores to % Change in Taxable Retail

Business Impacts

Downtown retailers, restaurants, bars, and arts/ entertainment venues have been hardest hit by the coronavirus pandemic. The Northeast Georgia business impacts survey found 89% of respondents reported losses in their finances, staff, and customer base and 77% of all respondents reported a loss in revenues over the calendar year. Sectors reporting the greatest decrease in revenue included: Retail, Personal-Care, Non-Profits, Food Service, Education, and Child Day Care Services (See Appendix B for the Survey Report). Many restaurants and local shops were able to persevere by adjusting their operations to offer online ordering, curbside pickup, delivery, and other socially distanced options. However, the lack of sporting events, conferences, festivals, and other events throughout the region during 2020 drastically reduced the number of patrons at local restaurants, bars, retailers, and venues. The recent business impacts survey found 56% of respondents reported that

² A marketplace facilitator is a person or company that contracts with a seller to facilitate a taxable retail sale by processing the payment and providing a service to facilitate the retail sale. The Marketplace Facilitator Law requires the payment of local sales tax for online transactions.

³ The Chmura Index measures economic vulnerability to the effects of the COVID-19 pandemic, based on local industry mixes.

some of their employees are still at risk of unemployment/layoffs as a result of the pandemic. Survey results and conversations with local stakeholders also indicated that, despite overall staffing reductions, many small businesses have struggled to maintain adequate staff, primarily due to exposures to COVID-19, childcare needs (due to remote learning or daycare closures), and loss of staff to other sectors during the initial shut-downs. According to the survey, 31% of businesses indicated that they expect insufficient staffing to accomplish critical work. Local stakeholders also expressed concern regarding the effects of the increased unemployment benefits on labor force participation; however, the region's January 2021 numbers show a near-return to February 2020 participation rates (see Figure 5).

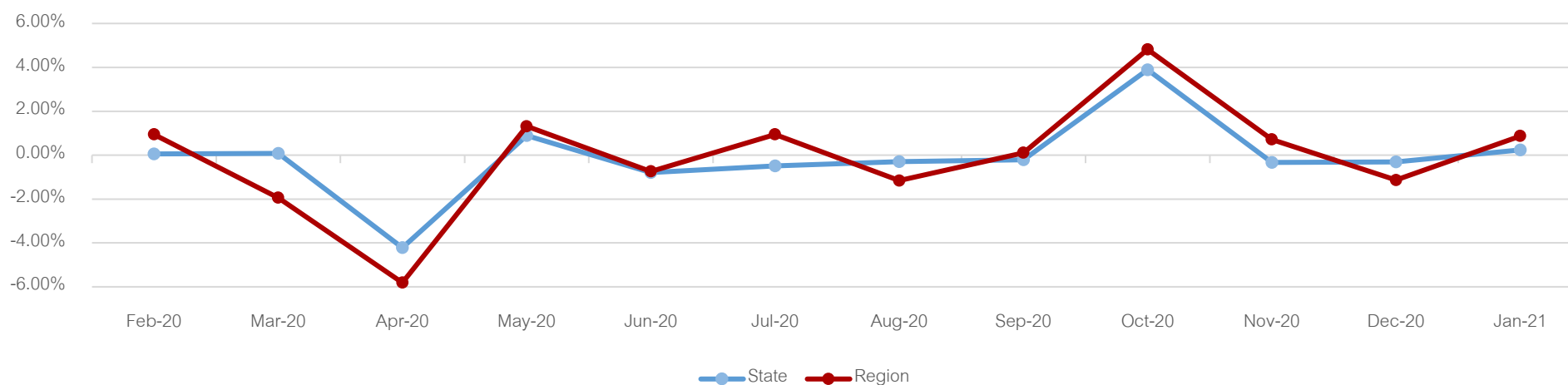


Figure 5. Labor Force Participation Rates (2020-2021)

The region's industrial and agricultural sectors appear to have largely emerged unscathed from the pandemic. In March-May, there were significant supply chain issues and businesses struggled with the implementation, and interpretation of workplace safety measures for workers, these hurdles worked to obstruct industrial output. Many industries (including manufacturing, biomedical, warehousing/ distribution, poultry, and food processing) reported an uptick in demand for their goods or services; throughout the region, other businesses found success as they pivoted to producing in-demand goods like PPE (personal protective equipment) and hand sanitizers. Local employers identified the following as the most needed forms of business assistance: professional development/ leadership, skill development/ workforce training, core business training, advice on identifying new revenue models, and advice on building capacity through partnership (Appendix B).

Unemployment

Unemployment rates reached record highs in April 2020, then steadily declined through the end of the year. While this downward trend is optimistic, continued monitoring is important: counties throughout the region continue to see unemployment rates points higher than what they were in 2019 and early 2020. In addition, declining numbers from October through the holiday season may have been due to seasonal hiring/gig labor. Into 2021, preliminary numbers show the rate of unemployment decreasing region wide, and labor force participation continuing a steady increase nearly region wide.

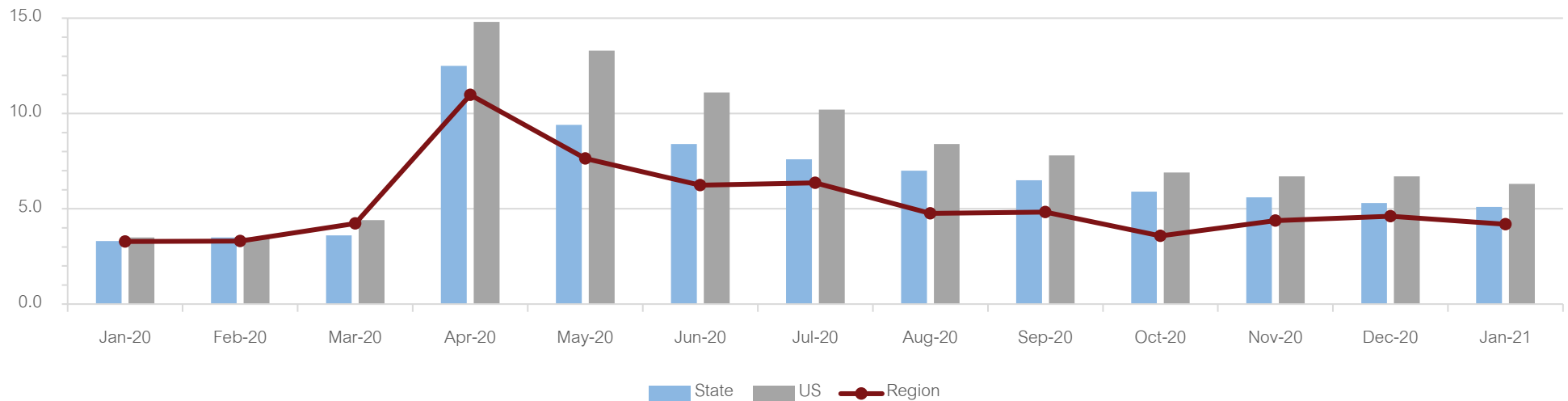


Figure 6. Unemployment Rates 2020-2021

Hiring Trends and Workforce Participation

Workforce engagement and development are key to addressing the region’s long-term economic vulnerabilities. Stakeholder conversations repeatedly identified shortages on labor in entry-level trade positions region-wide. Most recent data shows Northeast Georgia’s rate of unemployment is .5 point higher (Feb – 21’) than January 2020, and the labor force participation rate in nine counties has not recovered to pre-pandemic levels (see Figure 5 and Figure 6). Developing and retaining as well as recruiting and relocating a skilled workforce is essential to the region’s economic success. Stakeholders identified the following as key to an employee’s success: [soft skills](#), [access to support networks \(financial, childcare, mental\)](#), [affordable housing options](#), and [reliable transportation](#).

Mental Health

Throughout our stakeholder engagement sessions considerations as to the mental health of local populous was a perpetual topic of conversation. The COVID-19 pandemic has brought many challenges that can induce stress and high levels of anxiety. During the pandemic, four in ten adults in the U.S. reported symptoms of anxiety or depressive disorders, up from one-in-ten adults during 2019 (NHIS Early Release Program and U.S. Census Bureau Household Pulse Survey). County-to-county, throughout the Northeast Georgia Region, **the rate of suicide either increased or held at an increased rate into 2020** (GDPH). Causal data for the region shows that, leading up to the pandemic, mental health problems were the most cited circumstance leading to an individual's suicide (GDPH, 2011-2018). Other notable circumstances included alcohol/substance abuse issues, work-related issues, personal crises, and financial issues, among others. While current causal data is not yet available, nationwide reports of spikes in mental health issues and substance abuse during the pandemic suggest a local escalation is likely. Outreach efforts to identify and provide support to those in need are essential to a truly healthy economic recovery. The backing of programs and entities that provide mental health and alcohol/substance abuse support services will build resilience in the face of future disasters.

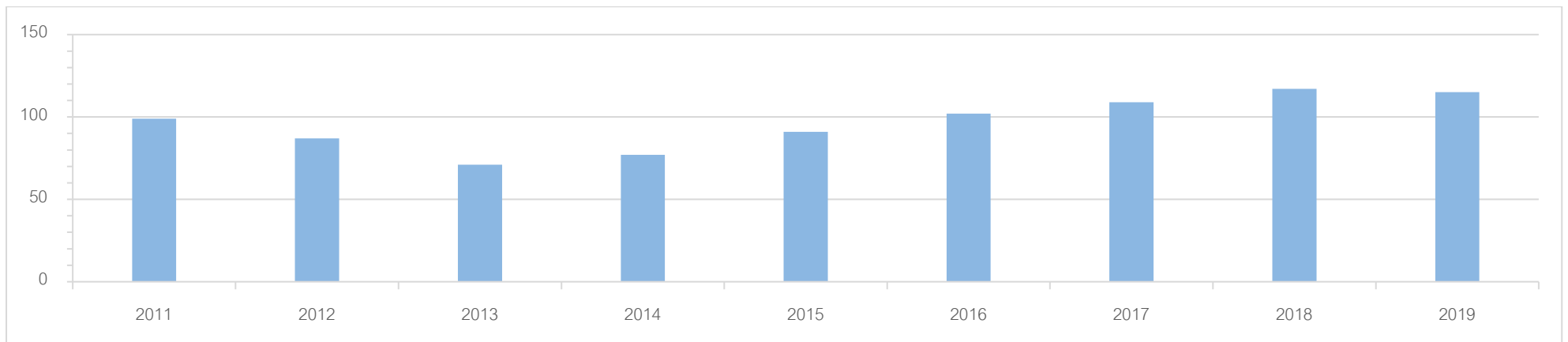


Figure 7. Total Suicides in Northeast Georgia, 2011-2019

Financial Assistance Programs

On March 27th, 2020 the Coronavirus Aid, Relief, and Economic Security Act (CARES Act) was signed into law. The CARES Act sent \$1,200 stimulus to qualifying individuals nationwide, provided for income tax credits, boosted unemployment payments paid at the state level by up-to an additional \$600, created the Paycheck Protection *loan* Program (PPP), provided billions in supplemental funding for the U.S. EDA and HUD, building each agencies capacity for targeted local relief, and allocated billions more in funding to other economic relief programs. The CARES Act also protected those with federally backed mortgages against foreclosure, and stipulated an eviction moratorium for renters in homes in federal assistance programs, or homes with federally backed mortgages. In December of 2020, congress voted to extend relief provisions in an omnibus appropriations act (CRRSAA); this provided for continuation of the federal unemployment boost, expansions to Small Business Association (SBA) loan and grant programs, additional appropriations to the US HUD for CDBGs, direct cash stimulus for qualifying individuals, among billions more in economic relief spending. Economic assistance programs were also offered at the state and local levels. The Georgia's Department of Community Affairs (DCA) provided rental assistance for tenants via the Georgia Rental Assistance (GRA) program. Georgia DOL worked to modify unemployment benefits qualifications to loosen restrictions on workers returning to the workforce. Local governments and utilities in Northeast Georgia also offered some assistance in the form of paused cut-offs for unpaid utilities, retail rental assistance, and micro-grants for small businesses, among other mitigation efforts; however, many of these expired at the start of 2021.

Broadband in Demand

Universal access to adequate internet speeds and bandwidths has long been a top priority throughout Northeast Georgia. In March 2020, shelter-in-place restrictions and public health advisories limiting gatherings to 10-or-fewer individuals resulted in an immediate shift to tele-work and online education. Local school systems worked to quickly disseminate equipment and instructions for online education. Offices pivoted to remote work and businesses modified their operations to online platforms. However, as demand for broadband access and bandwidth shot up, those without service were faced with the inability to reliably work or attend school. Even residents with broadband connectivity reported issues due to limited bandwidth when balancing the needs of multiple people in one household. Local schools, governments, and private entities worked to offer Wi-Fi hotspots for students, including outfitting school buses as mobile hotspots, but these only provide small-scale, short-term solutions. Local industries are also being hindered by lack of broadband; for example, poultry producers (one of the largest industries in the region and who has seen significant

demand increases during the pandemic) are reporting issues implementing new technologies that rely on broadband connectivity due to lack of reliable access in the rural areas where their chicken houses are located. Seventy-five percent of Impact Assessment survey respondents reported issues with lack of high-speed internet access in parts of their communities (see Appendix A). Conversations with local broadband providers identified a need for **greater education** on the existing services and options that are available and for **funding to support expansion** of broadband services to serve rural areas. The effects of the coronavirus pandemic has further highlighted the importance of broadband as essential infrastructure and the disadvantages faced by the many Northeast Georgians that still lack proper access. Long-term, comprehensive solutions are needed to address broadband needs at all scales, from residences to large-scale industries.



Pressure on Infrastructure

The pandemic has accentuated improvement and expansion needs across all infrastructure categories. The immediate shift to working and learning from home placed unprecedented pressure on local water and wastewater systems, particularly in rural and suburban areas. Increased production of goods with high water demands (including biomedical supplies, pharmaceuticals, and poultry) also spiked local demand, further testing the region's water systems and supply. Transportation infrastructure faces significant obstacles: materials prices drastically increased due to supply chain interruptions and heightened demand, while fuel tax revenues fell as

a result of the drop in personal vehicle use due to remote learning and work. Despite this decrease in noncommercial traffic, the region's roads and bridges have seen continuous truck traffic during the pandemic due to increased demand for online shopping and home-delivery services.

The growing frequency and intensity of storms has been a growing concern. The effects of climate change combined with the coronavirus pandemic revealed additional vulnerabilities. Measures must be taken to ensure communities in Northeast Georgia have proper emergency and fire equipment, as well as stormwater systems that will handle the increasing storm surges.

Stakeholders commented that [interjurisdictional coordination](#) will be key to the long-term success of infrastructure improvement and expansion projects in the region. [Long-range planning](#) that prioritizes areas of need and guides future development in a smart-growth manner will help ensure system-wide resilience.

Housing Options

Northeast Georgia continues to attract new and support the expansion of existing businesses and industries, driving up demand for diverse housing options. A limited overall housing stock and a lack of diverse unit-types have precipitated the current scarcity of housing options, particularly for the low- and moderate-income individuals that the majority of job vacancies in the region are targeting (GDOL-2). While many commute from areas where more affordable housing options are available, the time, expense, and unpredictability involved with extended commutes often outweigh the slight salary increases or other employer attempts to attract lower-wage workers to the region. Having a large percentage of the workforce that commutes long-distance jeopardizes the production capabilities of local industries as workers in these positions tend to lack proper safety nets and longer commutes subjects them to a greater number of daily obstacles. Low- and moderate-income households have also been some of the hardest hit by the effects of the pandemic due to temporary job loss, reduced hours, and increased childcare needs. The CARES Act and subsequent American Rescue Plan Act have provided some protections through mortgage and renter eviction moratoriums; however, this has resulted in significant debt for many households and placed a strain on landlords. DCA is currently overseeing the state's Rental Assistance (GRA) program to help mitigate this growing financial burden, but the true economic effect that the pandemic has incurred on renters and their landlords remains forthcoming.

The areas of Northeast Georgia bordering the Atlanta area, including Barrow, Jackson, Newton, and Walton counties, are experiencing additional housing demands as metro-area transplants with white-collar positions relocate to take advantage of the comparatively lower housing costs and the unique amenities and cultures in those

communities. The rise of tele-work, due to the coronavirus pandemic, has escalated this trend, with more able to trade metro-area congestion and pricing for homes in Northeast Georgia. More rural communities, including Morgan and Greene counties, also reported a noticeable influx of residents leaving urban areas in search of larger properties, small-town atmosphere, and natural and cultural amenities. As the existing housing stock in these communities is purchased and improved by urban-area transplants, the **median home prices are trending upward**, displacing and outcompeting the lower-income individuals that are needed to fill many of the local jobs. Infrastructural improvements, including broadband expansion, will likely exacerbate the situation by increasing home values in newly served areas.

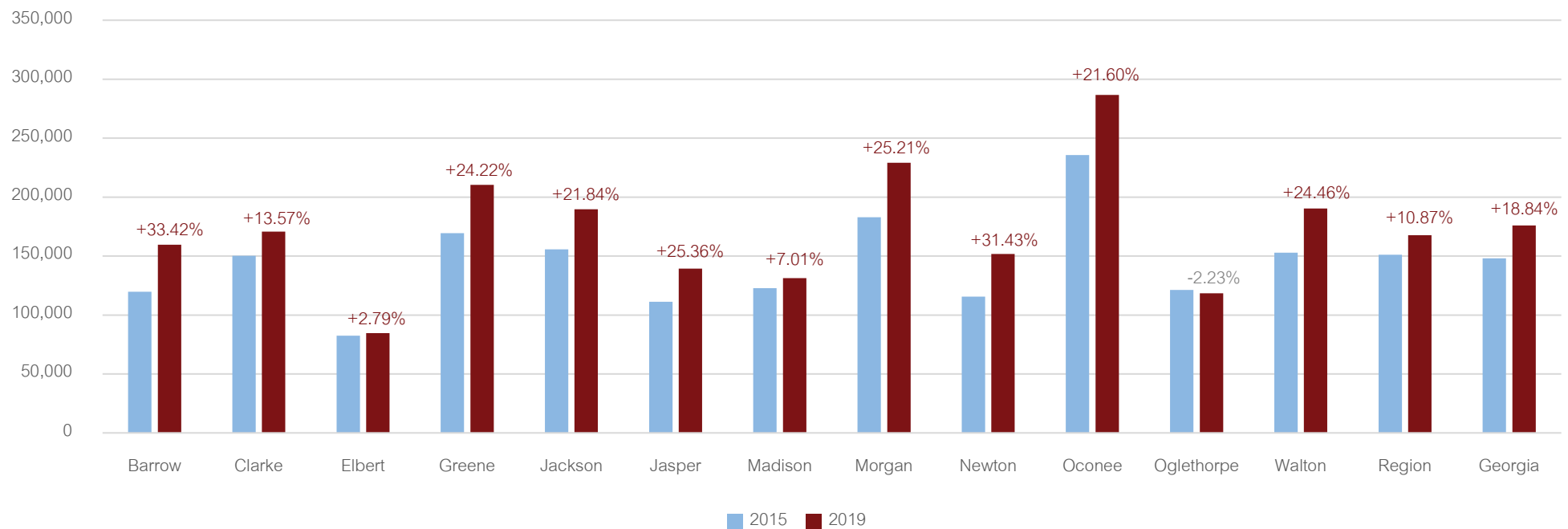


Figure 8. Median Value of Owner-Occupied Housing Units (2015 v 2019)

All of these factors, compounded with historically low-interest rates, have led to a housing market boom, solidifying soaring home costs through most of the region.

County Snapshots

The following snapshots provide [key economic and demographic data](#) for each county as it relates to the effects of the coronavirus pandemic. They are intended to capture the nuances not apparent at a regional scale. Note that, due to the ongoing effects of COVID-19, the economic trends and statuses illustrated in the following pages may shift; continued monitoring of this data is essential to properly track recovery and identify areas of need.

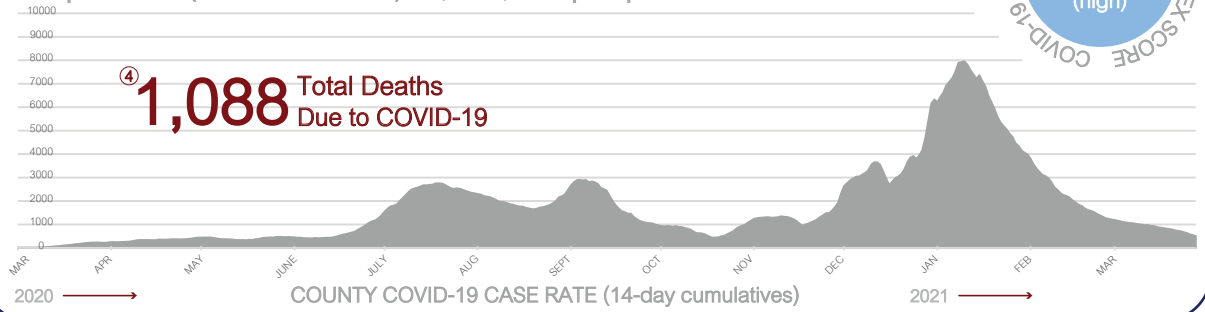
NORTHEAST GEORGIA

CORONAVIRUS IMPACT SNAPSHOT

① Population: 623,792 people (2019 estimate)

Median Age: 36.2

② Population (2050 estimate): 1,041,011 people

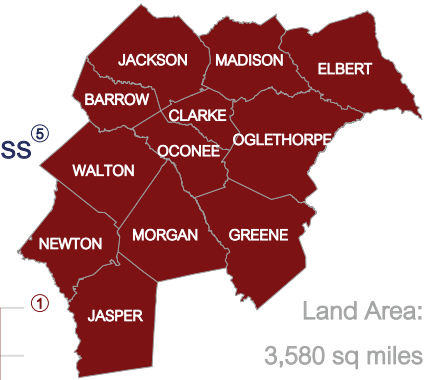
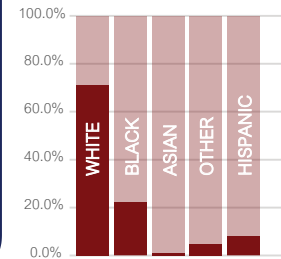


Broadband Access^⑥

Served: 250,838

Unserved: 44,144

% of ToT: 15%



Land Area:
3,580 sq miles



Top 10 Industries^⑧

1. Educational Services
2. Retail Trade
3. Manufacturing
4. Health Care & Social Assist.
5. Accommodation & Food Svcs.
6. Wholesale Trade
7. Construction
8. Transportation & Warehousing
9. Public Administration
10. Administrative & Support & Waste Mgmt

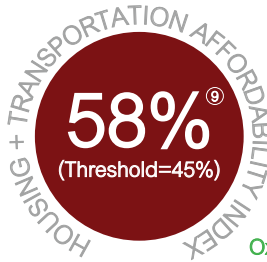
Median^① Household Income:



\$54,897

\$58,700

\$62,843



Universities/ Colleges:

- Oxford College (Emory), University of Georgia (UGA),
- University of North Georgia, Augusta University Medical Partnership with UGA/
- Athens College of Ministry, Athens Technical College, Georgia Military College,
- Georgia-Piedmont Technical College, Lanier Technical College, Piedmont College,
- Southern Crescent Technical College

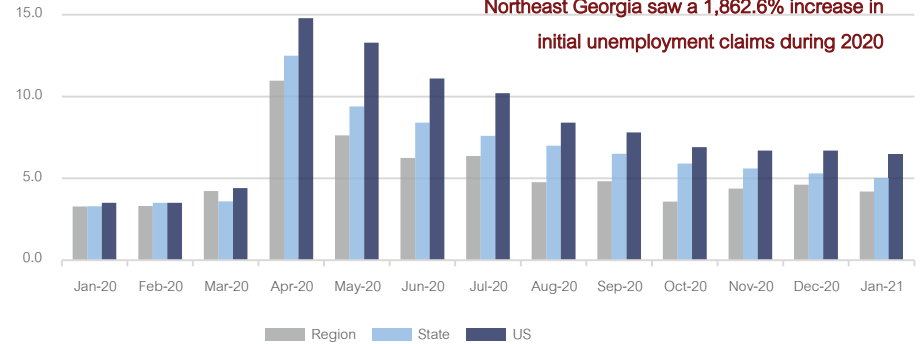
Housing:
246,320 UNITS
67% OWN
33% RENT

MEDIAN VALUE
\$167,582
\$176,000
\$217,500

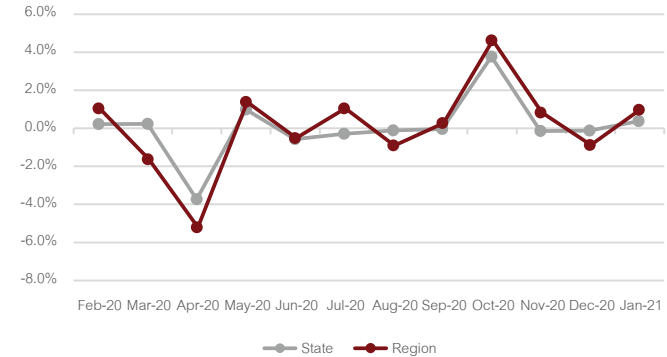


MEDIAN RENT
\$893/mo
\$1,006/mo
\$1,062/mo

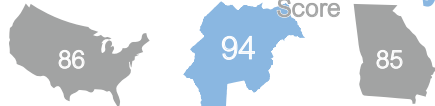
UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Economic Chmura Vulnerability Score^⑩



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

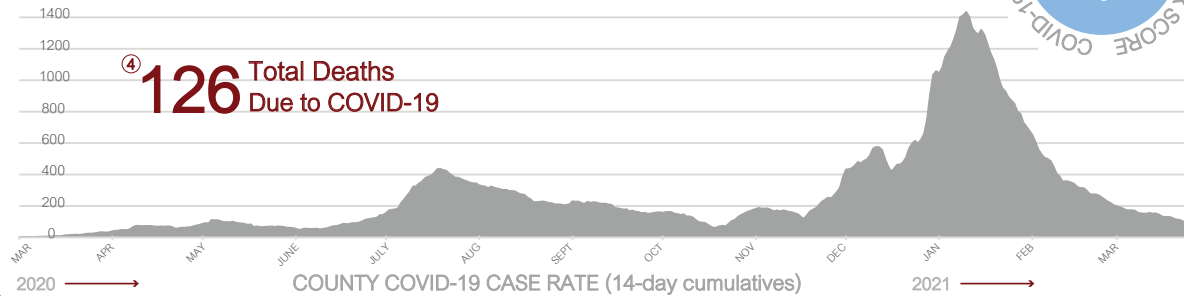
BARROW COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 78,991 people (2019 estimate)

Median Age: 34.8

② Population (2050 estimate): 187,785 people

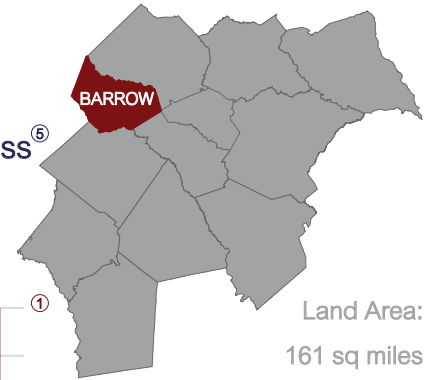
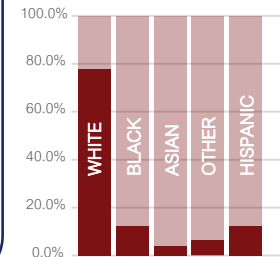


Broadband Access^⑥

Served: 33,184

Unserved: 508

% of ToT: 2%



Land Area:

161 sq miles

Municipalities: Auburn, Bethlehem, Carl, Braselton, Statham, and Winder*

*County Seat

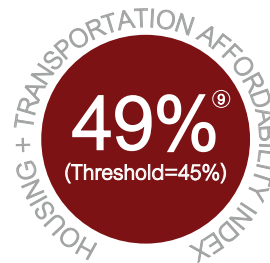


Top 10 Industries^⑧

1. Retail Trade
2. Manufacturing
3. Wholesale Trade
4. Accommodation & Food Services
5. Health Care & Social Assist.
6. Construction
7. Public Administration
8. Transportation & Warehousing
9. Professional, Scientific, & Technical Services
10. Administrative & Support & Waste Mgmt

Median^① Household Income:

- \$62,345
- \$54,897
- \$58,700



Housing:^①
28,423 UNITS
75% OWN
25% RENT

MEDIAN VALUE

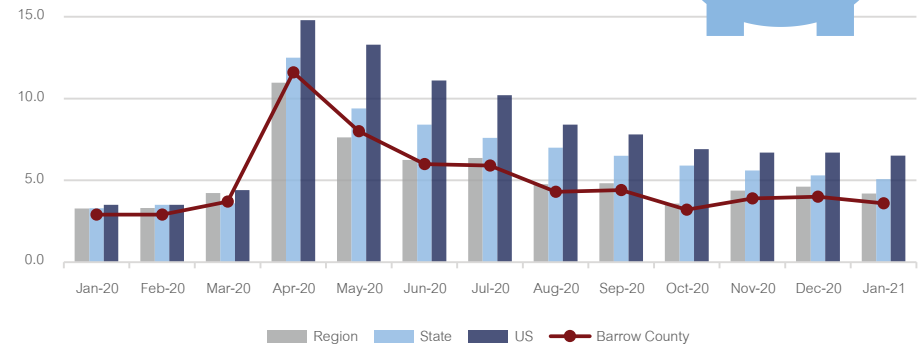
- \$159,700
- \$167,582
- \$176,000

MEDIAN RENT

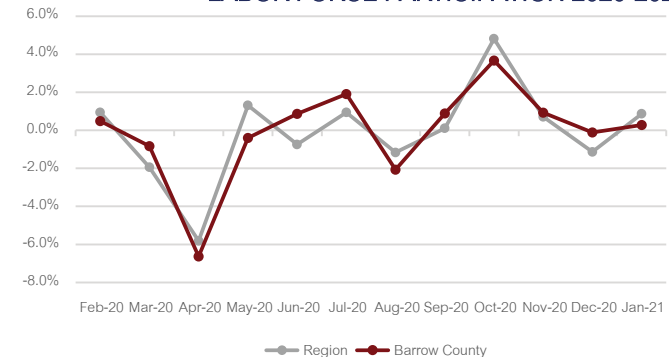
- \$994/mo
- \$893/mo
- \$1,006/mo



UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



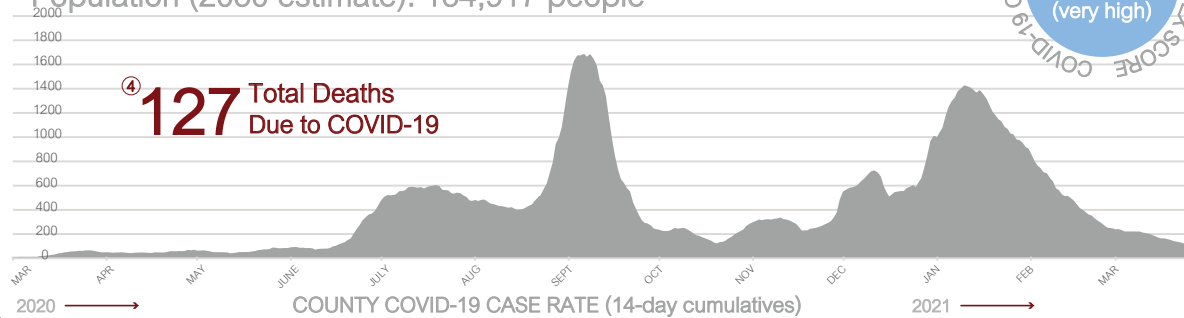
CLARKE COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 126,176 people (2019 estimate)

Median Age: 28

② Population (2050 estimate): 154,917 people

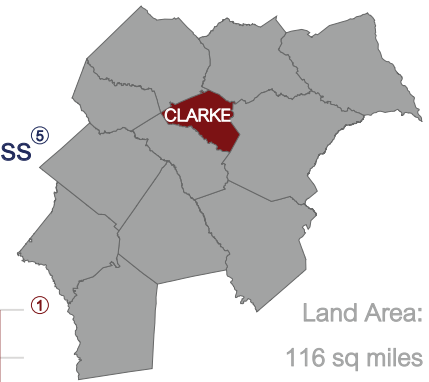
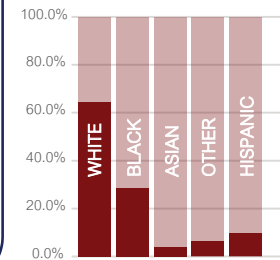


Broadband Access^⑥

Served: 56,189

Unserved: 630

% of ToT: 1%

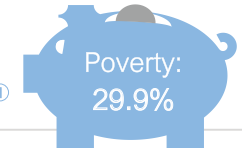


Land Area:

116 sq miles

Municipalities: Athens-Clarke County
Unified Government* and Winterville

*County Seat

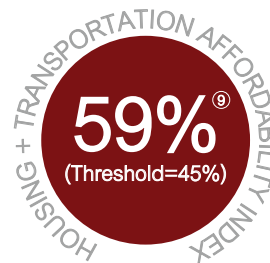


Top 10 Industries^⑧

1. Educational Services
2. Health Care and Social Assistance
3. Retail Trade
4. Accommodation and Food Services
5. Manufacturing
6. Public Administration
7. Administrative, Support, and Waste Management
8. Finance and Insurance
9. Wholesale Trade
10. Professional, Scientific, and Technical Services

Median^① Household Income:

- \$38,623
- \$54,897
- \$58,700



Housing:^①
52,941 UNITS
39% OWN
61% RENT

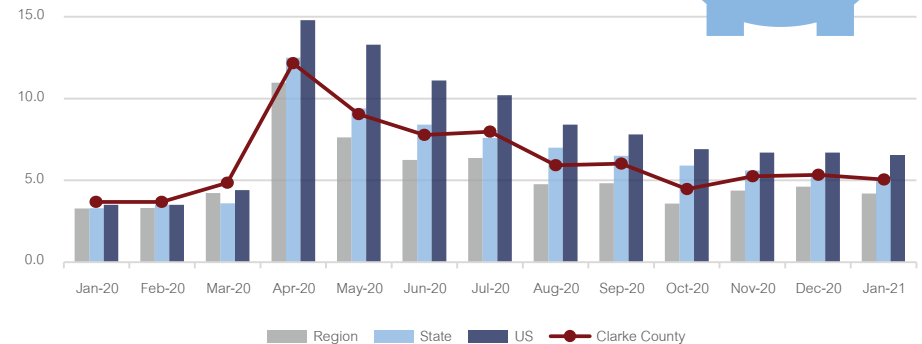
MEDIAN VALUE

- \$170,700
- \$167,582
- \$176,000

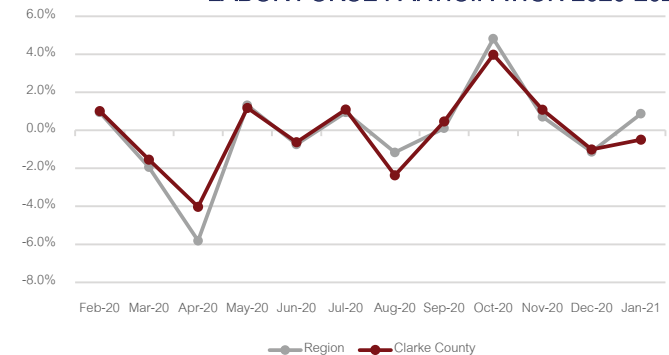
MEDIAN RENT

- \$856/mo
- \$893/mo
- \$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



⑦ LABOR FORCE PARTICIPATION 2020-2021



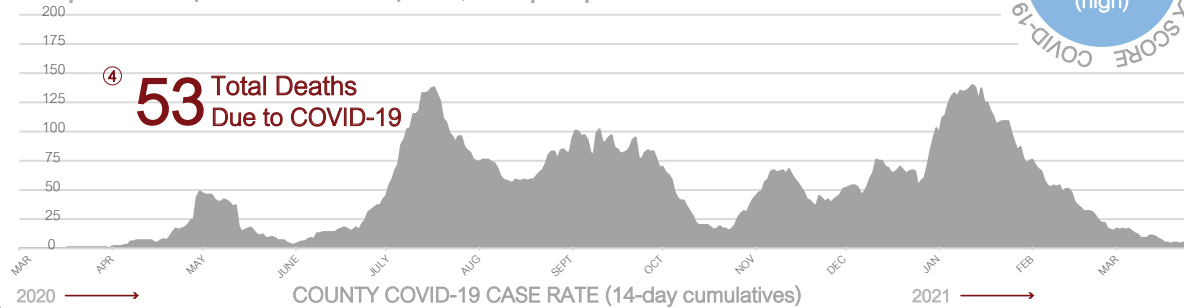
ELBERT COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 19,166 people (2019 estimate)

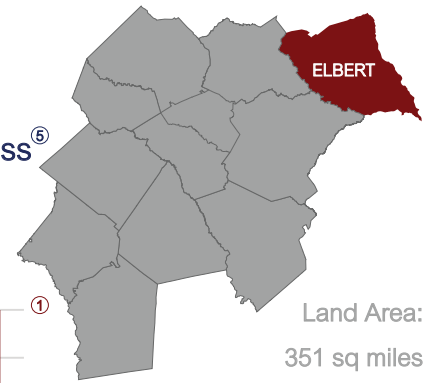
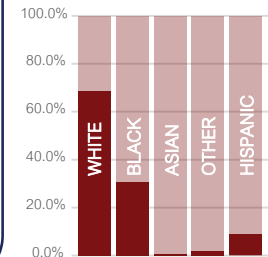
Median Age: 42.6

② Population (2050 estimate): 16,947 people



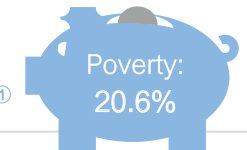
Broadband Access^⑥

Served: 8,232
Unserved: 2,840
% of ToT: 26%



Land Area:
351 sq miles

Municipalities: Bowman and Elberton*
*County Seat

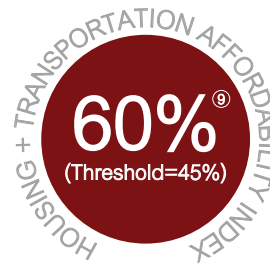


Top 10 Industries^⑧

1. Manufacturing
2. Retail Trade
3. Public Administration
4. Wholesale Trade
5. Health Care & Social Assist.
6. Accommodation and Food Svcs.
7. Finance and Insurance
8. Construction
9. Transportation and Warehousing
10. Mining, Quarrying, & Oil & Gas Extraction

Median^① Household Income:

- \$38,678
- \$54,897
- \$58,700



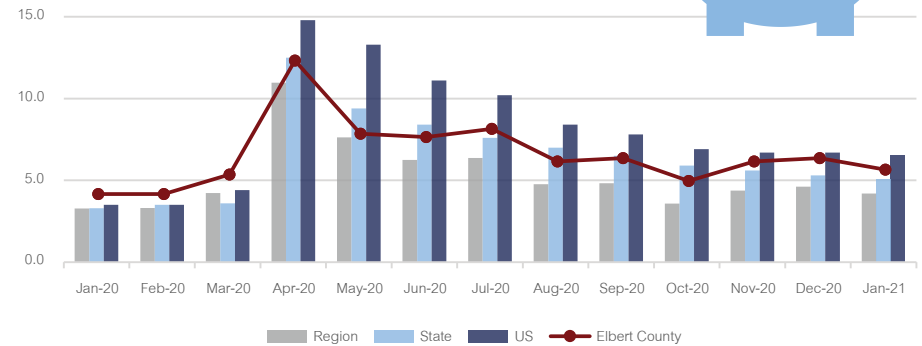
Housing: 9,630 UNITS
72% OWN
28% RENT

MEDIAN VALUE: \$84,700
MEDIAN RENT: \$685/mo

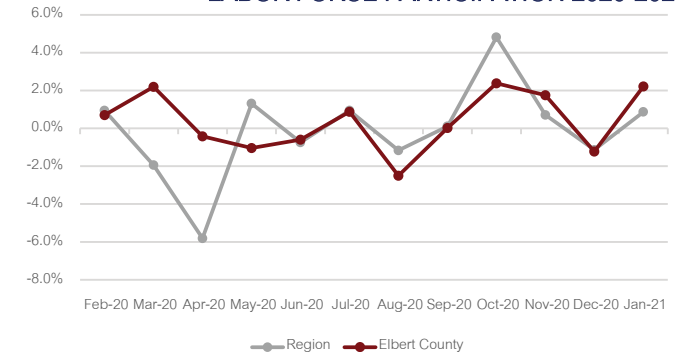
MEDIAN VALUE: \$167,582
MEDIAN RENT: \$893/mo

MEDIAN VALUE: \$176,000
MEDIAN RENT: \$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Economic Chmura Vulnerability Score^⑩



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

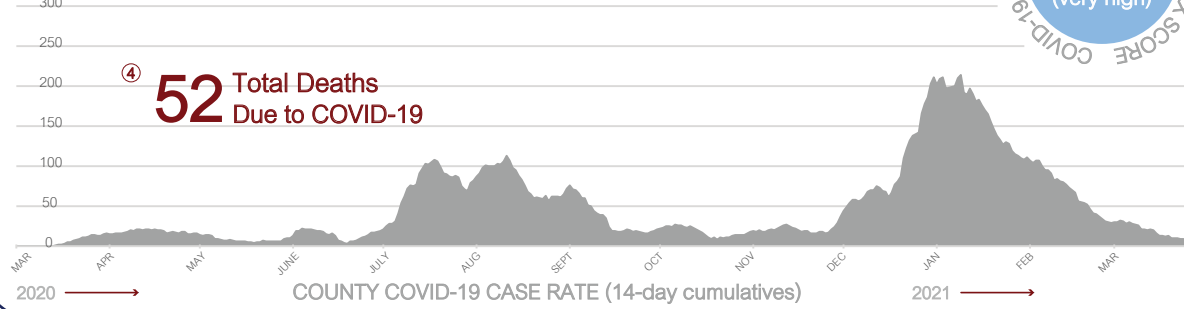
GREENE COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 17,349 people (2019 estimate)

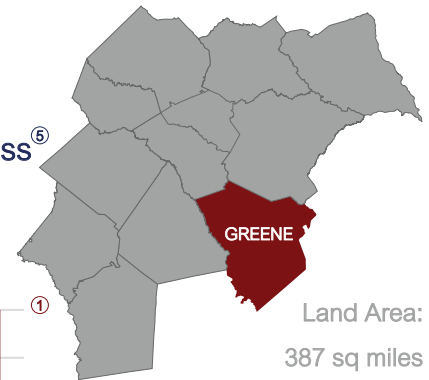
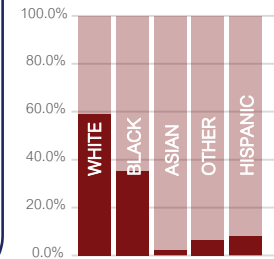
Median Age: 50.2

② Population (2050 estimate): 16,122 people

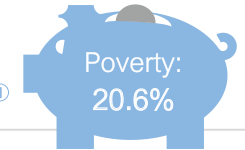


Broadband Access^⑥

Served: 8,181
Unserved: 4,248
% of ToT: 34%



Land Area:
387 sq miles
Municipalities: Greensboro*, Siloam,
Union Point, White Plains, Woodville
*County Seat

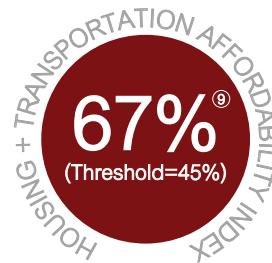


Top 10 Industries^⑧

1. Accommodation and Food Services
2. Construction
3. Retail Trade
4. Health Care and Social Assist.
5. Manufacturing
6. Public Administration
7. Administrative and Support and Waste Management
8. Agriculture, Forestry, Fishing & Hunting
9. Transportation and Warehousing
10. Finance and Insurance

Median^① Household Income:

- \$52,129
- \$54,897
- \$58,700



Housing:
9,753 UNITS
75% OWN
25% RENT

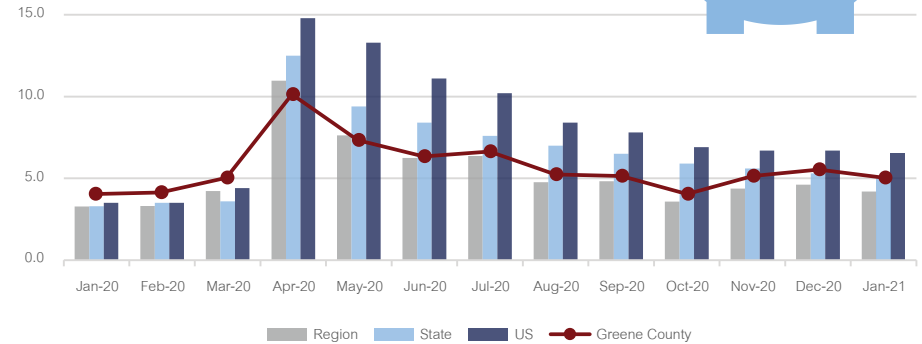
MEDIAN VALUE

- \$210,300
- \$167,582
- \$176,000

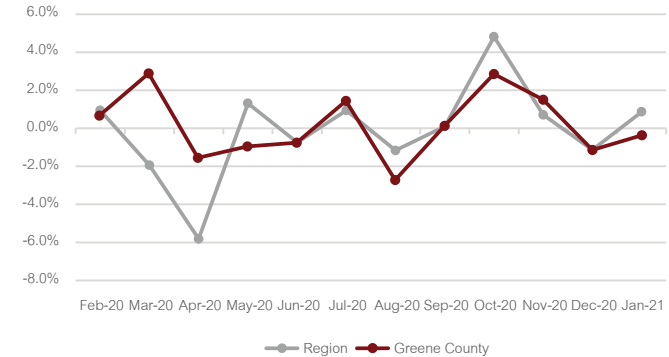
MEDIAN RENT

- \$727/mo
- \$893/mo
- \$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

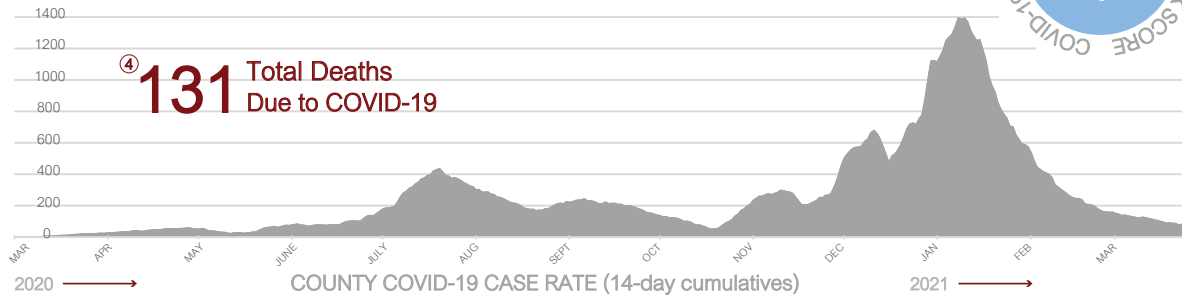
JACKSON COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 67,885 people (2019 estimate)

Median Age: 38.1

② Population (2050 estimate): 114,473 people

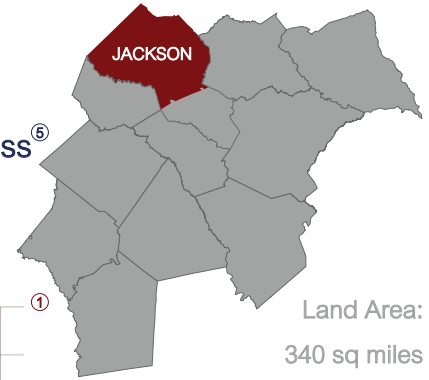
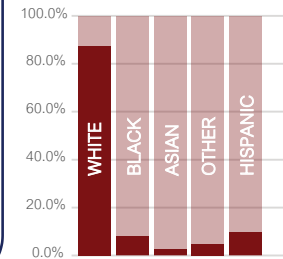


Broadband Access^⑤

Served: 28,445

Unserved: 6,707

% of ToT: 19%



Land Area:

340 sq miles

Municipalities: Arcade, Braselton, Commerce, Hoschton, Jefferson*, Nicholson, Pendergrass, and Talmo

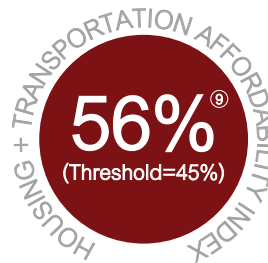
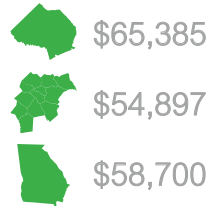
*County Seat



Top 10 Industries^⑥

1. Transportation and Warehousing
2. Manufacturing
3. Retail Trade
4. Wholesale Trade
5. Administrative and Support and Waste Management
6. Educational Services
7. Accommodation and Food Svcs.
8. Construction
9. Public Administration
10. Health Care and Social Assistance

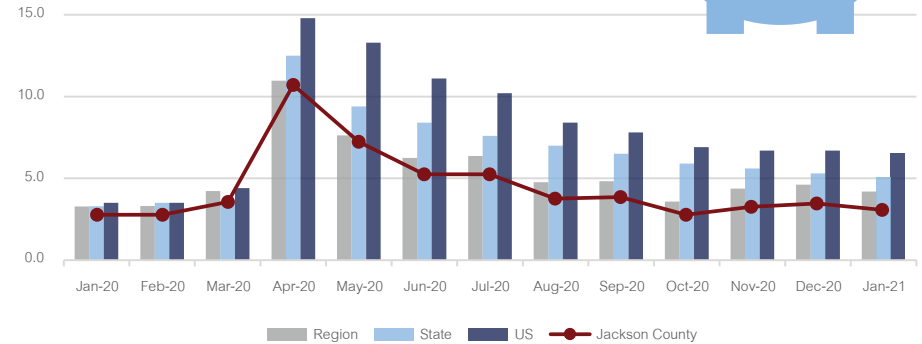
Median^① Household Income:



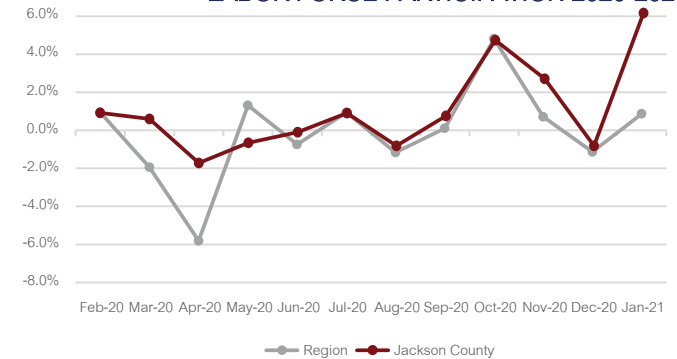
Housing:
25,388 UNITS
78% OWN
22% RENT



UNEMPLOYMENT 2020-2021^⑦



⑦ LABOR FORCE PARTICIPATION 2020-2021



Economic Chmura Vulnerability^⑩ Score



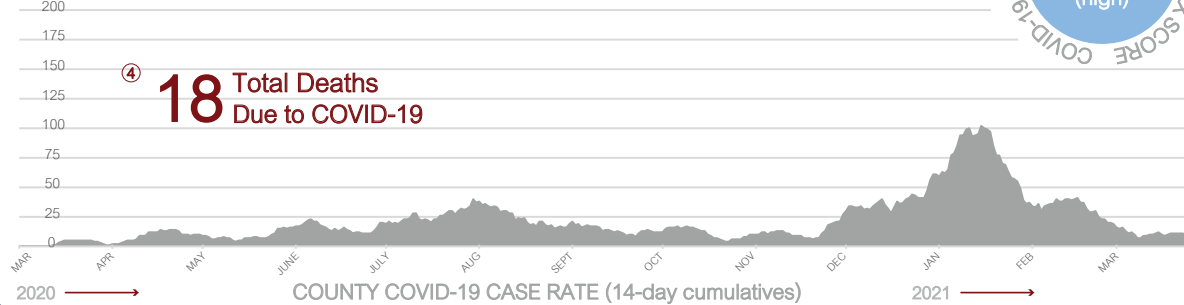
JASPER COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 13,916 people (2019 estimate)

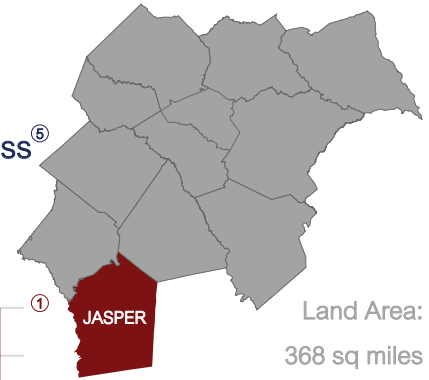
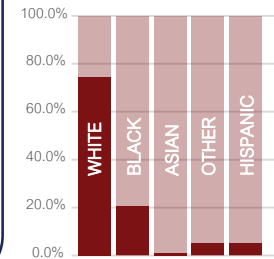
Median Age: 43.0

② Population (2050 estimate): 15,460 people



Broadband Access^⑤

Served: 2,710
Unserved: 4,601
% of ToT: 63%

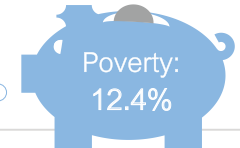


Land Area:

368 sq miles

Municipalities: Monticello*
and Shady Dale

*County Seat



Top 10 Industries^⑥

1. Manufacturing
2. Health Care and Social Assistance
3. Public Administration
4. Retail Trade
5. Accommodation and Food Services
6. Construction
7. Agriculture, Forestry, Fishing and Hunting
8. Wholesale Trade
9. Finance and Insurance
10. Transportation and Warehousing

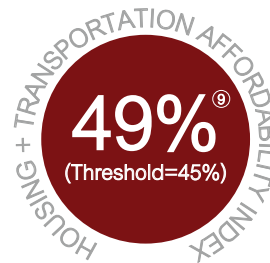
Median^① Household Income:



\$51,250

\$54,897

\$58,700



Housing:
6,445 UNITS
77% OWN
23% RENT

MEDIAN VALUE
\$139,400



MEDIAN RENT
\$848/mo

\$167,582



\$893/mo

\$176,000

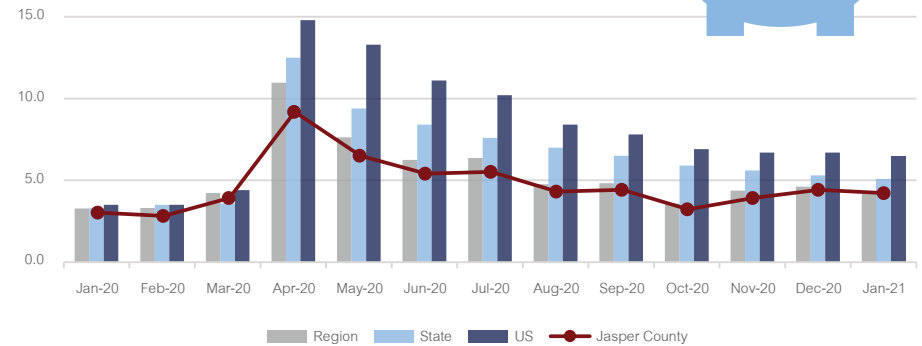


\$1,006/mo

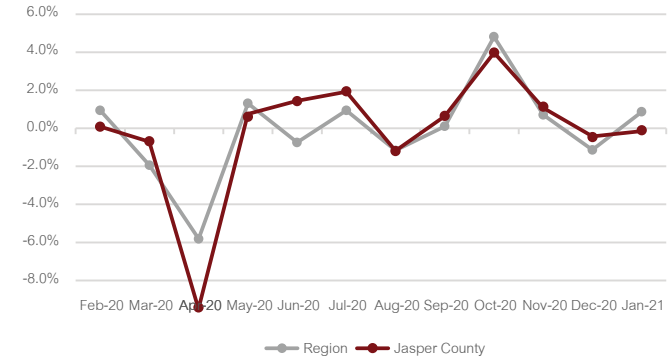
Economic Chmura Vulnerability^⑩ Score



UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

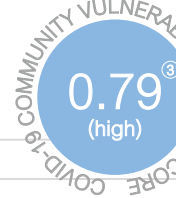
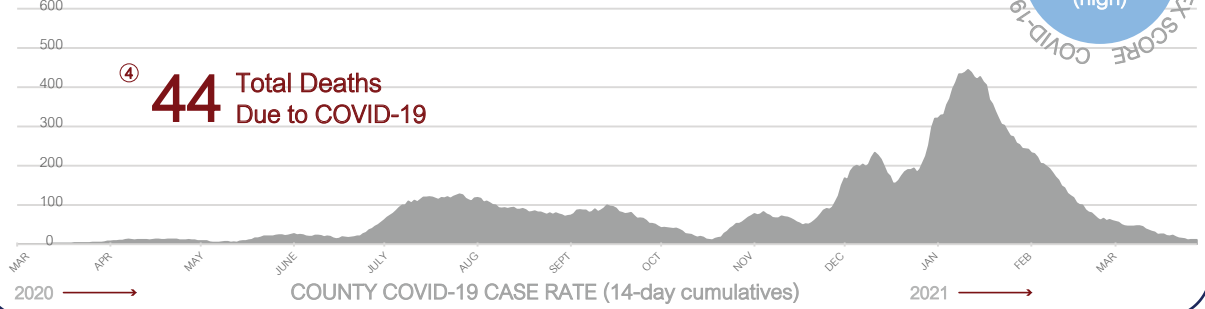
MADISON COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 29,218 people (2019 estimate)

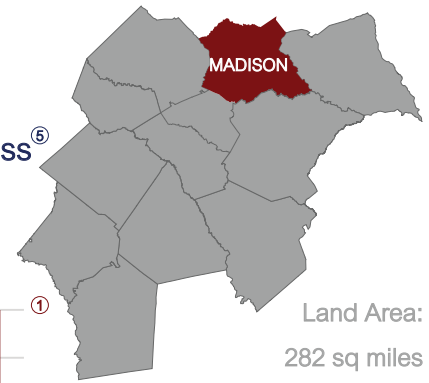
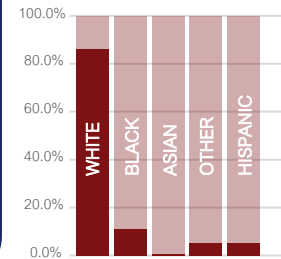
Median Age: 41.1

② Population (2050 estimate): 31,648 people



Broadband Access^⑥

Served: 9,714
Unserved: 4,486
% of ToT: 32%



Land Area:
282 sq miles

Municipalities: Carlton, Colbert, Comer, Danielsville*, Hull, and Ila

*County Seat

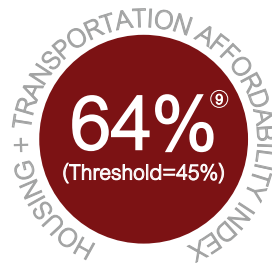


Top 10 Industries^⑧

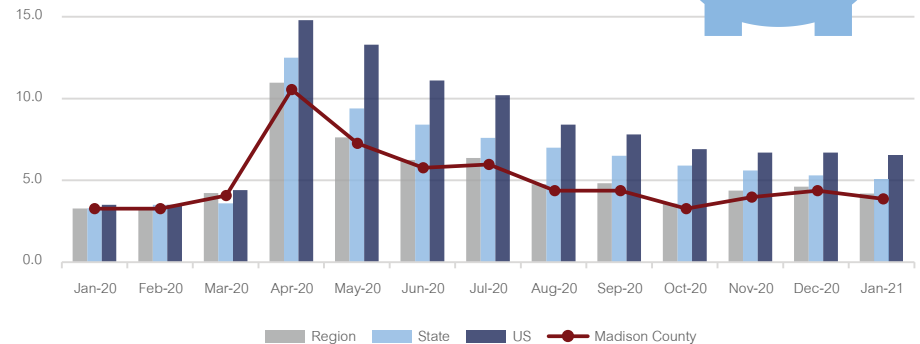
1. Retail Trade
2. Construction
3. Public Administration
4. Manufacturing
5. Health Care & Social Assist.
6. Accommodation & Food Svcs.
7. Administrative & Support & Waste Management
8. Professional, Scientific, & Tech Svcs.
9. Transportation & Warehousing
10. Finance & Insurance

Median^① Household Income:

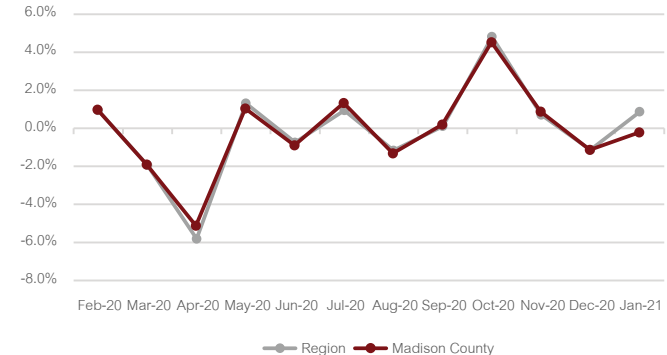
- \$52,500
- \$54,897
- \$58,700



UNEMPLOYMENT 2020-2021^⑦



⑦ LABOR FORCE PARTICIPATION 2020-2021



Economic Chmura Vulnerability Score^⑩



Housing:
12,004 UNITS
75% OWN
25% RENT

MEDIAN VALUE

- \$131,300
- \$167,582
- \$176,000

MEDIAN RENT

- \$715/mo
- \$893/mo
- \$1,006/mo

Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

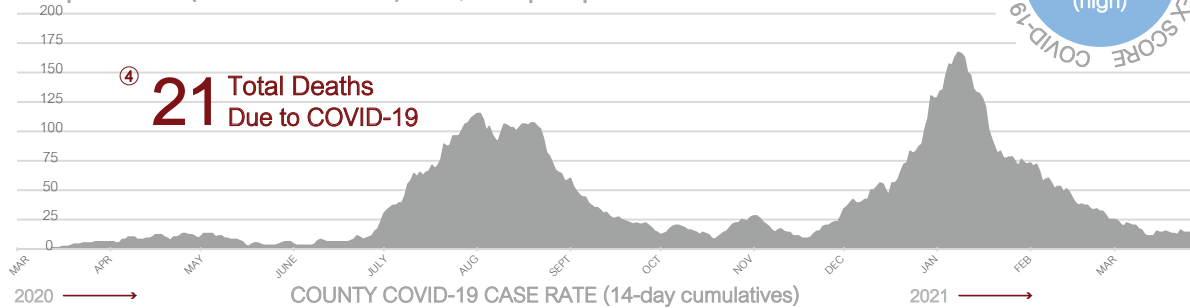
MORGAN COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 18,507 people (2019 estimate)

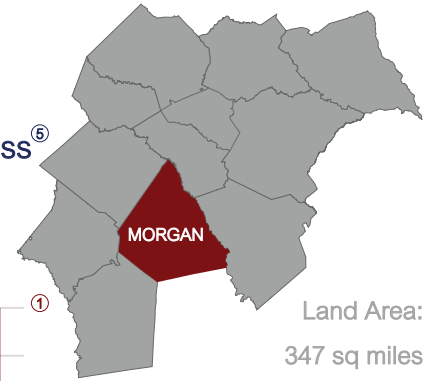
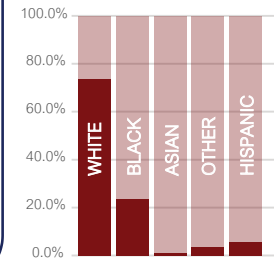
Median Age: 44.6

② Population (2050 estimate): 22,877 people



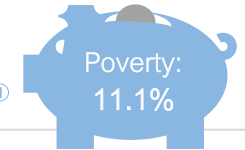
Broadband Access^⑥

Served: 4,332
Unserved: 5,994
% of ToT: 58%



Municipalities: Bostwick, Buckhead,
Madison*, and Rutledge

*County Seat



Top 10 Industries^⑧

1. Manufacturing
2. Retail Trade
3. Accommodation and Food Svcs.
4. Wholesale Trade
5. Health Care and Social Assist.
6. Public Administration
7. Administrative and Support and Waste Management
8. Construction
9. Other Services (except Public Administration)
10. Professional, Scientific, and Tech Svcs.

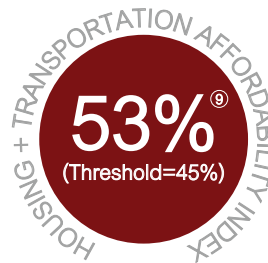
Median^① Household Income:



\$66,178

\$54,897

\$58,700



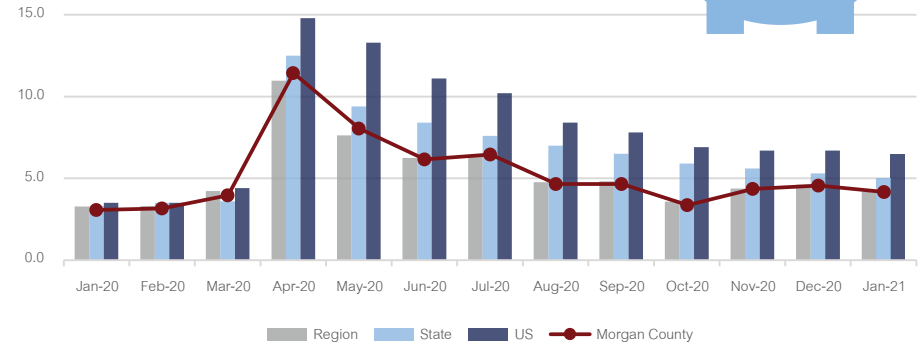
Housing:
7,753 UNITS
73% OWN
27% RENT

MEDIAN VALUE
\$229,000
\$167,582
\$176,000

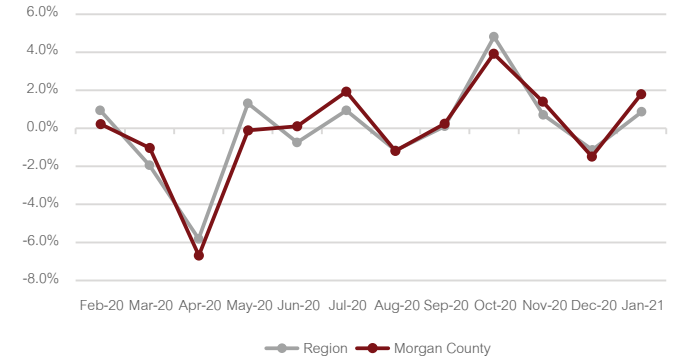


MEDIAN RENT
\$832/mo
\$893/mo
\$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



⑦ LABOR FORCE PARTICIPATION 2020-2021



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

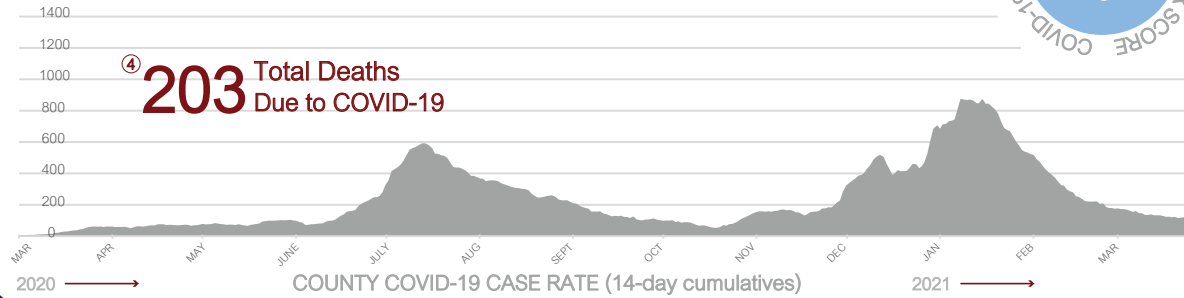
NEWTON COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 108,079 people (2019 estimate)

Median Age: 36.4

② Population (2050 estimate): 195,320 people

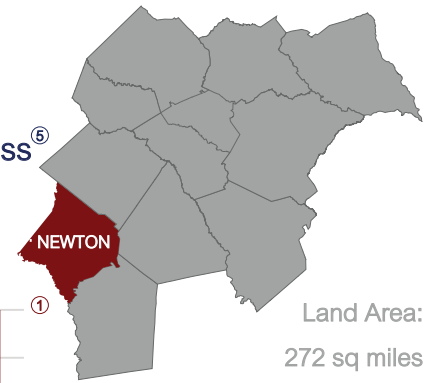
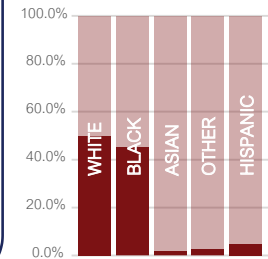


Broadband Access^⑥

Served: 43,534

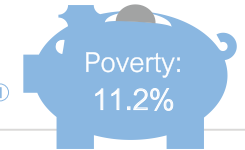
Unserved: 3,793

% of ToT: 8%



Land Area:
272 sq miles

Municipalities: Covington*, Mansfield,
Newborn, Oxford, Porterdale,
and SocialCircle
*County Seat

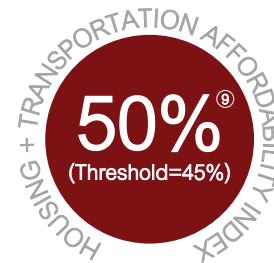


Top 10 Industries^⑧

1. Manufacturing
2. Retail Trade
3. Administrative & Support & Waste Management
4. Accommodation & Food Svcs.
5. Health Care & Social Assist.
6. Construction
7. Public Administration
8. Wholesale Trade
9. Professional, Scientific, & Technical Services
10. Transportation & Warehousing

Median^① Household Income:

- \$56,316
- \$54,897
- \$58,700



Housing:
39,312 UNITS
68% OWN
32% RENT

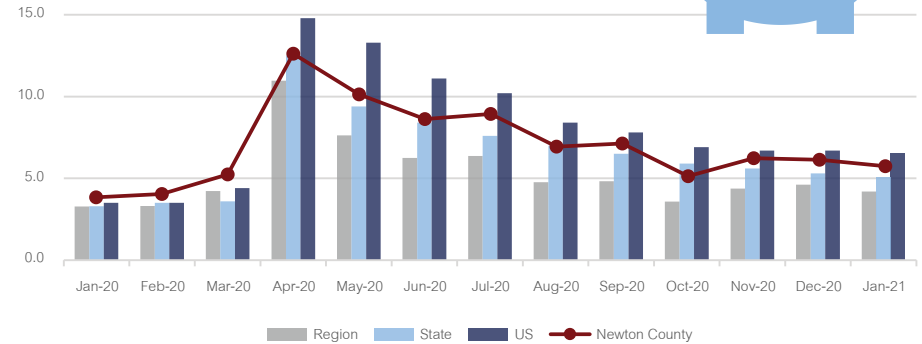
MEDIAN VALUE

- \$151,800
- \$167,582
- \$176,000

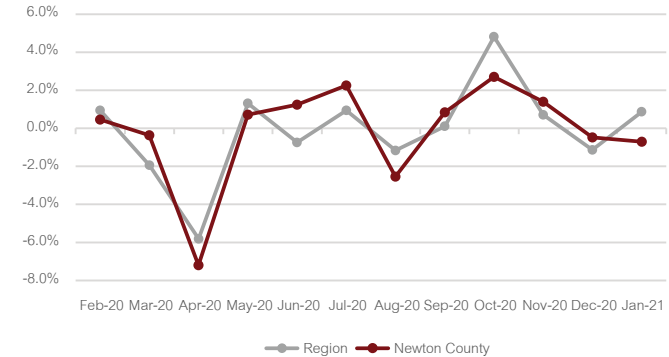
MEDIAN RENT

- \$1,010/mo
- \$893/mo
- \$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

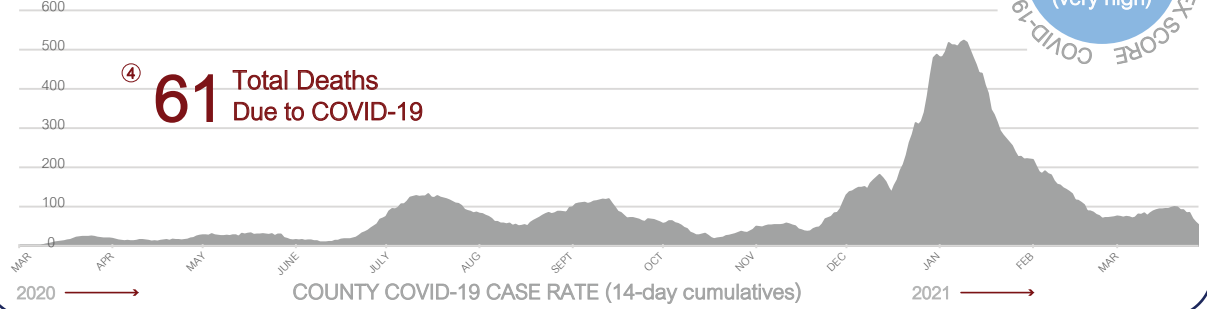
OCCONEE COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 38,132 people (2019 estimate)

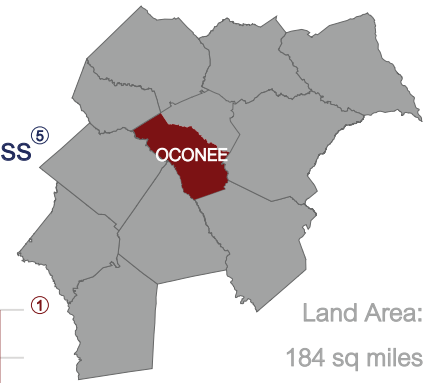
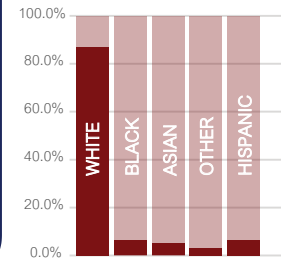
Median Age: 40.4

② Population (2050 estimate): 62,289 people



Broadband Access^⑥

Served: 16,109
Unserved: 2,174
% of ToT: 12%



Land Area:
184 sq miles

Municipalities: Bishop, Bogart,
North High Shoals, and Watkinsville*

*County Seat

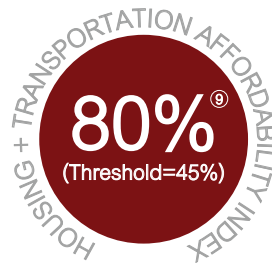


Top 10 Industries^⑧

1. Retail Trade
2. Educational Services
3. Health Care & Social Assistance
4. Accommodation & Food Services
5. Wholesale Trade
6. Administrative & Support & Waste Management
7. Professional, Scientific, & Technical Services
8. Manufacturing
9. Construction
10. Management of Companies & Enterprises

Median^① Household Income:

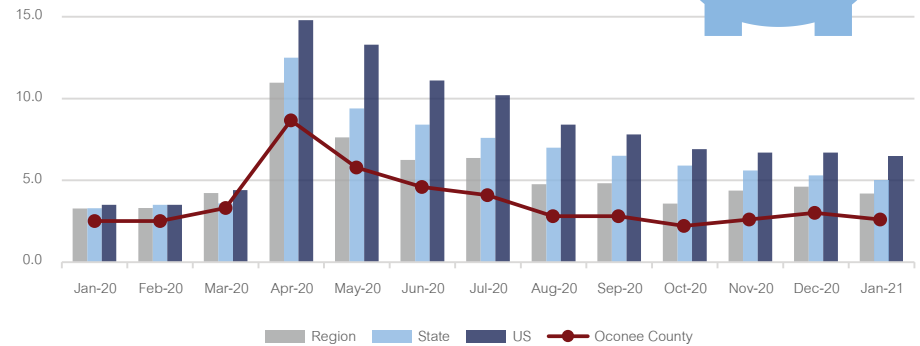
- Georgia: \$90,751
- South Carolina: \$54,897
- Georgia: \$58,700



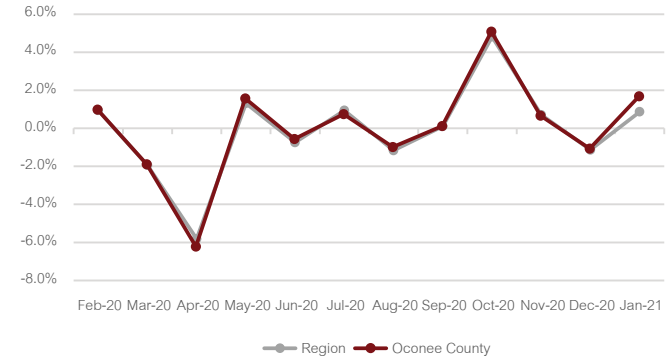
Housing:^①
14,217 UNITS
83% OWN
17% RENT

MEDIAN VALUE: \$286,600
MEDIAN RENT: \$1,001/mo
\$167,582
\$893/mo
\$176,000
\$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

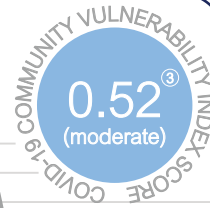
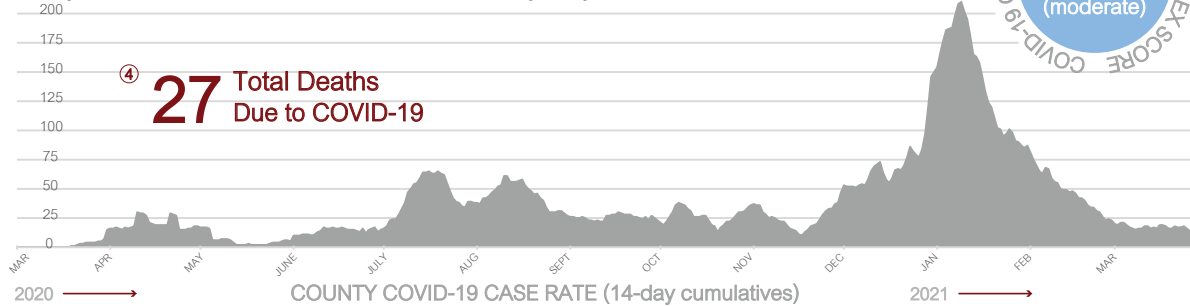
OGLETHORPE COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 14,931 people (2019 estimate)

Median Age: 42.4

② Population (2050 estimate): 13,947 people

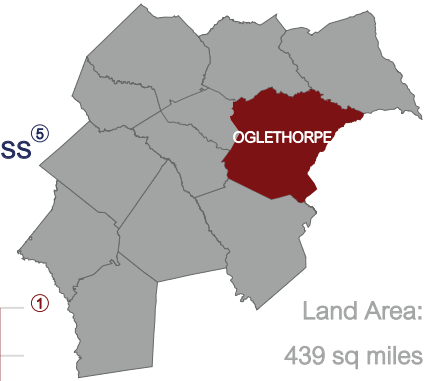
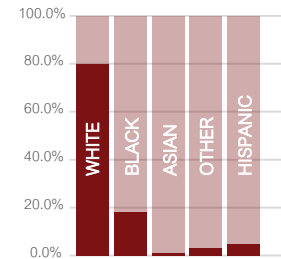


Broadband Access^⑥

Served: 3,886

Unserved: 3,604

% of ToT: 48%

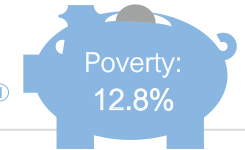


Land Area:

439 sq miles

Municipalities: Arnoldsville, Crawford, Lexington*, and Maxeys

*County Seat

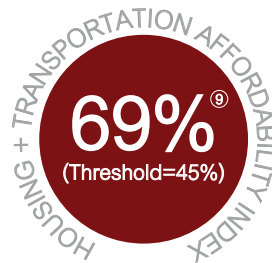


Top 10 Industries^⑧

1. Construction
2. Manufacturing
3. Ag., Forestry, Fishing & Hunting
4. Retail Trade
5. Health Care & Social Assist.
6. Administrative & Support & Waste Management
7. Accommodation & Food Services
8. Finance & Insurance
9. Mining, Quarrying, & Oil & Gas Extraction
10. Other Services (except Public Admin.)

Median^① Household Income:

- \$47,120
- \$54,897
- \$58,700

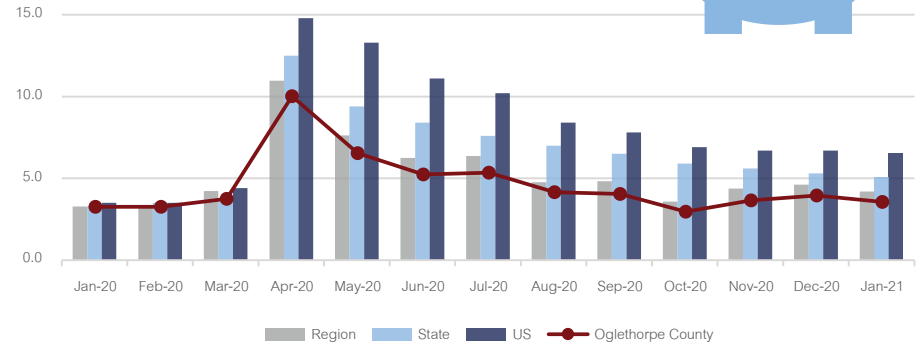


Housing:^①
6,660 UNITS
77% OWN
23% RENT

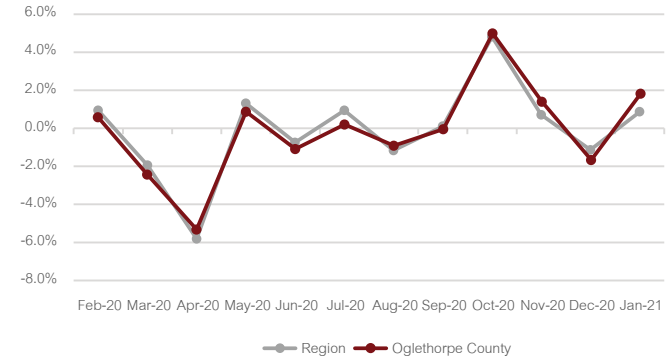
MEDIAN VALUE: \$118,500, \$167,582, \$176,000

MEDIAN RENT: \$725/mo, \$893/mo, \$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Economic Vulnerability Score^⑩



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)

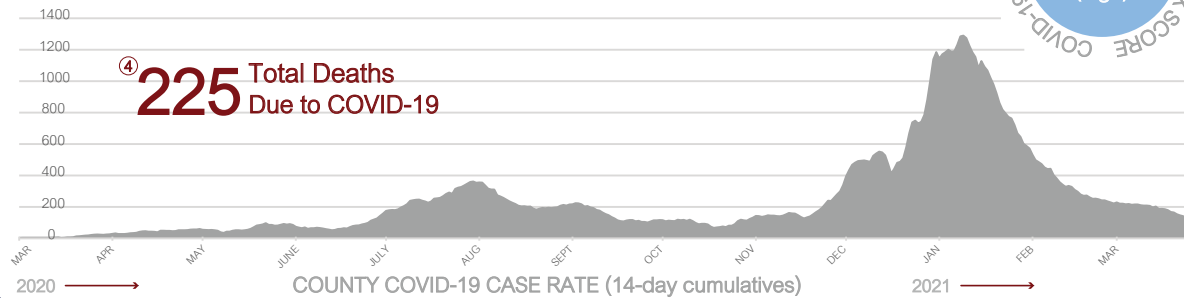
WALTON COUNTY

CORONAVIRUS IMPACT SNAPSHOT

① Population: 91,442 people (2019 estimate)

Median Age: 38.7

② Population (2050 estimate): 163,301 people

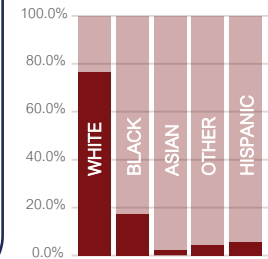


Broadband Access^⑥

Served: 36,322
 Unserved: 4,529
 % of ToT: 11%



Land Area: 326 sq miles
 Municipalities: Between, Good Hope, Jersey, Loganville, Monroe*, Social Circle, and Walnut Grove
 *County Seat

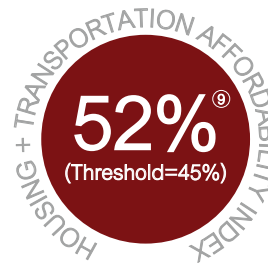


Top 10 Industries^⑧

1. Construction
2. Manufacturing
3. Retail Trade
4. Educational Services
5. Health Care & Social Assist.
6. Accommodation & Food Svcs.
7. Transportation & Warehousing
8. Wholesale Trade
9. Public Administration
10. Administrative & Support & Waste Mgmt

Median^① Household Income:

- \$61,599
- \$54,897
- \$58,700



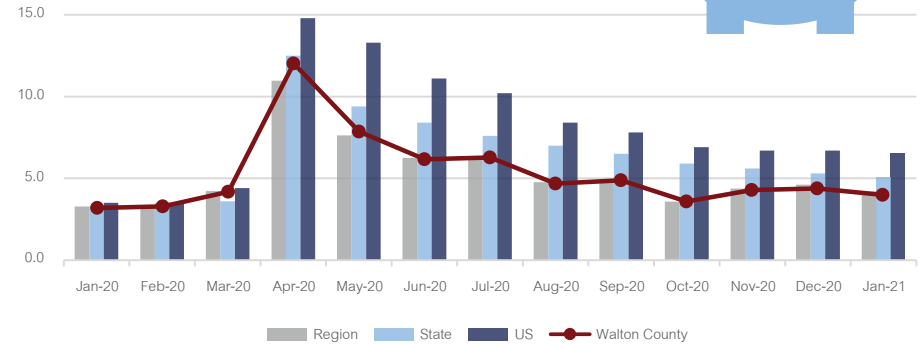
Housing: 33,794 UNITS
 74% OWN
 26% RENT

MEDIAN VALUE: \$190,300
 MEDIAN RENT: \$1,000/mo

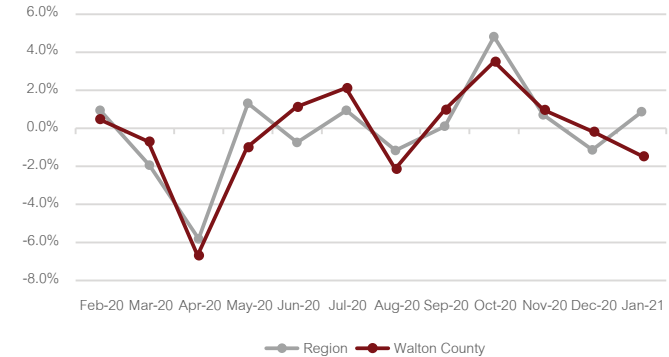
MEDIAN VALUE: \$167,582
 MEDIAN RENT: \$893/mo

MEDIAN VALUE: \$176,000
 MEDIAN RENT: \$1,006/mo

UNEMPLOYMENT 2020-2021^⑦



LABOR FORCE PARTICIPATION 2020-2021^⑦



Sources: 1. ACS 5-year Estimates (2015-2019) 2. Governor's OPB (2015) 3. CCVI (2020) 4. Georgia GIO (2021) 5. DCA GBDI 6. GDOL (Q3, 2020) 7. BLS LAUS (March 2021) 8. NEGA Impact Assessment (2020) 9. H+T Index (2017) 10. CEVI (2021)



Chapter 3

NEGRC staff held discussions with leaders and stakeholders throughout the region, following the presentation of county and regional demographic and economic impact data related to the effects of COVID-19.

The following page identifies [key themes and topics](#) identified during those discussions; these insights and observations were synthesized into the Action Plan, presented in Chapter 4.

Action Items

The Action Items identified herein are intended to guide economic recovery and resilience efforts throughout Northeast Georgia by building upon existing strengths and pursuing opportunities that will overcome weaknesses and reduce the impacts of threats to the region's economy brought on by the COVID-19 pandemic. The following economic recovery and resilience-building Action Items for the Northeast Georgia Region were identified through discussions with key stakeholders (including economic development professionals and key industry representatives), guidance from the PGS Committee, and extensive data analysis:

- Improve and expand **Broadband Access** in the region
- Encourage and provide **Quality, Market-Reflective Housing**
- Public, private, and non-profit **Partnerships to Foster a Skilled & Dedicated Workforce**
- Promotion and cultivation of **Authentic Communities**
- **Maintain Competitiveness** at state, national, and global levels

Chapter 4 presents the Action Plan and identifies strategies, tasks, and performance measures for each Action Item. Strategies that build Northeast Georgia's economic resilience are highlighted.



Chapter 4

Action Plan

The Action Plan identifies strategies, tasks, key facilitators, and performance measures for each Action Item. The plan is intended to recognize and act upon identified issue areas in the region that we're either brought upon or magnified by the COVID-19 pandemic. This plan is consistent with the authorized scope of work from the U.S. EDA, which calls for the development of a disaster recovery and resilience plan focused on the pandemic, and aligns with the approved Comprehensive Economic Development Strategy (CEDS) currently maintained by the NE Georgia region.

Note:

Action Items are not numbered in order of importance. Key facilitators should prioritize the following based on existing capabilities, available funding, and achievability.

Action Item 1

Improve and expand **Broadband Access** in the Region

The region's COVID-19 impact assessment identified a lack of high-speed broadband access in our region. 75% of survey respondents reported a lack of high-speed internet access in part of their community. This inadequacy was supported throughout our stakeholder outreach sessions by local economic development professionals who identified broadband access as the pertinent issue to Economic Resiliency. Broadband access has long been a prevalent issue in our region, only exacerbated by the digital push that the COVID-19 pandemic brought down on our region. In a short time frame, schooling, business, occupations, and familial interaction we're all expected to be done digitally. Many communities in our region did not possess this capability. According to the DCA Georgia Broadband Deployment Initiative, 44,114 unserved locations exist in our region when referencing terrestrial broadband that meets the DCAs served definition. The following strategies intend to promote the continued deployment and development of broadband infrastructure in our region.

Vision: Comprehensive, region-wide, broadband access that meets a served definition for all Northeast Georgians.

Key Facilitators: EMCs, Broadband Providers, Georgia Department of Community Affairs, OneGeorgia Authority, Local Government Staff, Elected Officials, NEGRC Planning and Government Services (PGS) Division



Strategy 1.a | Develop public, private, & non-profit partnerships to expand broadband infrastructure

Tasks:

- Review local planning documents, permitting procedures, and regulations to ensure state and federal funding eligibility and competitiveness (ex. Broadband Ready Certification, awarded through DCA)
- Appoint a local official/ expert to liaison broadband expansion discussions
- Develop broadband feasibility studies and identify priority areas for expansion
- Hold conversations between local governments and providers (local EMCs and private providers) to discuss feasibility of broadband projects and collaborate on state/ federal funding applications
- Develop understandings of the confidence/ risk of investments into broadband infrastructure

Performance Measures:

- Number of new businesses/ households served by broadband expansion project(s) in the region
- Number of new businesses/ households served by broadband expansion project(s) in the region
- Number of communities in the region certified Broadband Ready by DCA

Positioning local governments for broadband expansion is an essential step toward economic recovery and building future resilience. Public partnerships with private broadband providers and EMCs are proving to be a powerful way to expand broadband access through a community, particularly into rural, less populated areas where the potential customer base is inadequate to support the private-sector investment required to serve those communities. Available federal and state funding is actively being awarded to construction-ready projects developed through public-private partnerships.



Georgia's Broadband Ready Certification is one way a local government can demonstrate commitment to investing in and expediting broadband infrastructure expansion in their community. To apply, a community must adopt a Broadband Ordinance and incorporate a Broadband Element into their local comprehensive plan. The certification is intended to demonstrate that broadband expansion is a top priority for that community and that the local government has taken steps to reduce obstacles to broadband infrastructure investment. Broadband Ready Communities will also gain additional points when applying for state broadband funding.

Strategy 1.b | Prepare for new & diverse technologies

Tasks:

- Develop and disseminate information on current options and technologies available through local providers
- Work with local, state, and federal partners to stay informed on forthcoming technologies and trends
- Adopt, implement, and maintain cybersecurity systems
- Develop understanding of necessary upgrades to broadband infrastructure over time for maintenance and sustained utility

Performance Measures:

- Understanding of all current venues for broadband infrastructure development
- Participation in educational efforts to stay updated on changing technologies
- Increased use of available technologies by local residents/businesses
- Implementation of procedures and protocols to advance internet security
- Cost input estimates for upkeep and maintenance of broadband infrastructure

Northeast Georgia has a supply of vacant land and development incentive programs in place. Creating and maintaining an inventory of available properties and industry-friendly programs (such as Camera-Ready Communities, Opportunity Zones, and Job Tax Credits) throughout the 12-county region will increase visibility for all areas of Northeast Georgia and connect developers and entrepreneurs with the appropriate local government staff (see Strategy 3.d for regional business-incentive objectives).



Easy-to-find information is essential to recruit desired businesses and new development; with 12 counties and over 50 municipalities, Northeast Georgia's communities should coordinate recruiting and marketing efforts to attract profitable and diverse industries to all areas of the region.

Action Item 2

Encourage and provide **Quality, Market-Reflective Housing**

Stakeholders in our initial outreach session consistently identified a lack of supply in the housing market of market-rate ("workforce") housing as a vital issue. Supply chain fallouts, and adjustments to monetary policies as a result of the pandemic have worked to inflate the value of existing housing, and cause construction costs to soar. Working to provide more options and an increased supply will ensure housing, whether owned or rented, is available to all in the region. The lack of housing options can dually be seen as a barrier to maintaining an adequate local workforce. As industries and businesses continue to relocate to and grow in Northeast Georgia, we must provide housing solutions that coincide with the economic profiles our new workforce will bring with them. Building cooperative networks between local governments, community industry, property developers, and state officials is crucial in making headway into this issue area. The following strategies intend to encourage the development of quality, market-reflective housing options in our region.

Vision: A diverse mix of quality, market-rate housing that meets the needs of Northeast Georgia residents across a variety of income-levels and life-stages.

Key Facilitators: Local Housing Authorities, Local Planners, Elected Officials, Georgia's Department of Community Affairs, Community Financial Institutions, Local Schools, NEGRC PGS Division



Strategy 2.a | Issue area education

Tasks:

- Engage community leadership and public with education of housing issues and opportunities within the community (utilize programs like Georgia Initiative for Community Housing [GICH])
- Connect community leaders to educational resources (webinars, studies, workshops) on housing solutions and best practices, including balancing residential development with its demand on local infrastructure and schools
- Coordinate “field trips” for local leaders to visit other communities and experience local success stories
- Identify barriers to development of affordable housing
- Pursue incentives and funding for affordable housing development and/or rehabilitation efforts
- Identify and support initiatives and legislation that subsidize the development of market-rate housing
- Connect first-time homebuyers with support (ex. Georgia Dream)
- Partner with local schools to understand how to best structure and locate growth in a community

Performance Measures:

- New housing that incorporates a diverse mix of unit types at varying price points
- Housing revitalization/ infill projects that provide affordable housing units
- Number of GICH communities in the region

The lack of a sufficient variety of housing options to support the full spectrum of life stages and income levels is a threat to the region’s continued economic prosperity. Education of community leaders and citizens to this issue and long-term, sustainable solutions is imperative. As industries and businesses continue to relocate to and grow within the region, we must develop housing solutions that match the economic profiles of our new and maturing workforce. Healthy growth will come from heavy inter-organizational collaboration and the steps that will be taken to address housing issues must be measured and thorough. Local governments should take advantage of state and federal educational and financial resources. Building cooperative networks between local governments, community industry, local schools, property developers, and state officials is crucial in making headway into this issue area. Approaching housing at a regional scale will help ensure a true variety of housing options is achieved without overburdening individual communities.



Strategy 2.b | Ensure proper zoning and incentives are in place for successful rehabilitation & development

asks:

- Review local zoning regulations and re-evaluate ordinances that could hinder the development of appropriate new housing projects by private enterprise
- Consider allowing for Accessory Dwelling Units (ADUs) and other tools to diversify the local mix of housing units, particularly through infill
- Ensure code enforcement is active and funded in communities and review code enforcement practices
- Identify and pursue funding and incentive programs to support rehabilitation and infill development

Performance Measures:

- Reclamation of underused and blighted properties
- Private investment in small-scale developments
- Development of housing types not previously present in a community

A crucial step in the development of a healthy mix of housing options is the identification of inappropriate regulatory obstacles. A review of local development regulations and land use plans can help remove archaic barriers from entry for desired development. In addition, consideration of non-traditional housing options, such as Accessory-Dwelling Units, can help to diversify local housing options and incentivize further infill development.



Local governments should also build a full toolbox of incentives for the rehabilitation, upkeep, and infill of existing properties. Code enforcement, when done right, helps to protect community identity, protect property values, and attract and retain residents, employers, and visitors. Partnerships with existing neighborhoods are essential; beautification projects (ex. landscaping neighborhood entrances) can encourage residents' ownership and private property improvements. Additional incentives, such as blight taxes or housing repair loans and grants, can serve as both a carrot and stick for existing property owners. Local government officials should connect eligible homeowners with home rehabilitation programs and information to curb blight and protect against resident displacement.

Strategy 2.c | Identify households at risk of eviction or mortgage foreclosure and engage them with available protection resources

Tasks:

- Identify owners of rental properties and connect them to DCA resources (ex. Georgia Rental Assistance Program)
- Connect with non-profit groups operating that offer housing assistance programs to better promote educational outreach efforts
- Identify households in, or at risk of, foreclosure by way of public notice, then work to partner homeowners with financial institutions to assess protectionary program eligibility (ex. Forbearance Plan, HUD Office Housing Counselors)

Performance Measures:

- | | |
|------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| • Mitigation of the rate of foreclosure | • New identification of households at risk of eviction, or foreclosure |
| • Number of successful applicants for Rental Assistance Programs | • Increase in the number of households participating in mortgage protectionary programs |
| • Reduced rental evictions | |

As the coronavirus pandemic came down on the region, unemployment hit record highs. Associated job loss, underemployment, and long term unemployment put many residents at risk of losing their housing. Temporary protections for mortgage forbearance and evictions moratoriums were in place; however, long-term recovery requires partnership to inform and connect at-risk residents with assistance programs. In addition, support for the owners of rental properties is currently being overseen by DCA. Partnerships between local governments, non-profit groups operating within their community, and financial institutions should be formed to extend additional housing assistances and disseminate information on programs, services, and protections (ex. forbearance planning or mortgage counselling).



Action Item 3

Public, private, and non-profit **Partnerships to Foster a Skilled & Dedicated Workforce**

Region-wide, unemployment is still points higher than pre-pandemic levels (January 2021), workforce participation remains below pre-pandemic levels, and businesses are struggling to fill open positions. Conversation with local stakeholders noted a perceived lack of involvement and the availability of entry-level laborers in the region. Workforce engagement and development are perpetual efforts that will continue to be a central issue to economic development in Northeast Georgia. Stakeholder sessions also identified workforce barriers including, but not limited to, underdeveloped soft skills, limited access to affordable housing and reliable transportation, and a need for support networks (financial, childcare, and mental). The following strategies intend to develop, recruit, retain, and reward an educated and skilled workforce in our region.

Vision: A culture of hard-work and reliability, surrounding a regional workforce that meets the needs of burgeoning and existing industry.

Key Facilitators: Technical Colleges, School District Administration, Chambers of Commerce, Industry Leadership, Workforce Development Agencies, Georgia DOL, Non-Profits specializing in workforce development, NEGRC



Strategy 3.a | Further develop partnerships between local schools, colleges, & universities

Tasks:

- Facilitate conversations between K-12 schools and higher education institutions to further the dissemination of information relating to the benefits, necessity, and process of entry into skilled trade positions in our region
- Utilize inner-school contacts to promote outreach to parents and students as to the trade industry in our region and the benefits it brings
- Deploy and expand upon accredited programs within local schools, with an emphasis on stackable certifications that are in demand by local industry

Performance Measures:

- Increase in graduates entering trade professions in the region
- New partnerships/ programs to prepare K-12 students
- New partnerships/ programs/ increased funding for existing programs that train/ prepare local residents 16+

Northeast Georgia faces region-wide labor shortages, specifically in entry-level trade positions; this issue was only exacerbated by the coronavirus pandemic. Working to build coalitions to further understand the current and future needs of private enterprise in Northeast Georgia can help to guide workforce development practices in local schools, with targeted apprenticeship programs, certifications, and developmental academies. Another focus needs to be on educating and disseminating information on the benefits, outlooks, and pipeline of skilled trades to parents and children in the school system. If we can develop greater interest in these programs, we can work to develop more involved courses, where students can graduate high school and begin working in a skilled, and in-demand trade right away in their community.



Strategy 3.b | Identify & pursue opportunities for funding and expansion of workforce development programs

Tasks:

- Research and plan cost estimates for the addition of workforce development programs in high-demand opportunities
- Engage private enterprise on private sector buy-in to worker development programs and trainings (fund matching, investment into program development, on-the-job training opportunities)
- Explore the potential of local fund allocation, or matching, to aide in workforce development funding (SPLOST, Loan/Bond opportunities)
- Partner local governments with state and federal opportunities for funding (ex. National Dislocated Worker Grants, SAEI Grants)
- Identify and engage private enterprise to assess workforce needs in the present and going into the future
- Identify and coalesce with non-profit organizations working to promote workforce development in the region

Performance Measures:

- Identification of internal funding opportunities
- Establishment of Public, Private and Non-Profit partnerships to advance workforce development practices
- Identification of external funding opportunities

A central component to the further development of workforce development programs is access to funding. Preparing a workforce for high-skill trades, which are in high demand, requires greater capital investment. Regional workforce development resources are stretched thin. Working to identify alternatives avenues of revenue generation to compound existing investment is crucial to the development of a highly skilled and marketable workforce. Engaging local private enterprise on private sector buy-in to development programs would provide part of the solution. These partnerships can lead to direct routes to employment following completion of training programs, and incentivize employee retention throughout industries in our region. Additionally, local, state, and federal agency partnerships that support programs in targeted in-demand sectors could help bridge the current funding gap.



Strategy 3.c | Optimize workforce participation of underemployed & at-risk individuals

Tasks:

- Engage private industry to provide internal education and skill training programs
- Partner with state and federal partners (including GDOL, Substance Abuse and Mental Health Services Administration (SAMHSA)) to ensure private and public entities have access to information, guidance, and support services for substance abuse and mental health in the workplace
- Further develop and support programs that target specific populations facing barriers to workforce participation (ex. veterans, aging residents, handicapped individuals, persons with criminal histories)
- Offer targeted training and educational programs for aging workers (ex. technical college academies, boot camps, digital literacy)

Performance Measures:

- Increases in employee retention
- Private investment in on-the-job training and employee development
- Increase in digital literacy among aging workers
- Further development of individuals in vulnerable economic sectors
- Increased participation of aging, at-risk, and previously incarcerated individuals in the local workforce

Re-education, re-skilling, and resilience-building of existing, aging, and underemployed workers is a necessity as we move forward. The coronavirus pandemic demonstrated that a digital-ready workforce is key to economic resilience in the face of disaster. Additionally, it highlighted the importance of flexible, dynamic employees and businesses that proactively respond to changing work environments and demands. However, as laid-off workers pivoted to new careers and businesses developed new platforms and products, the re-opening of the economy has left many businesses struggling to re-fill positions and train existing employees on new technologies. A two-pronged focus on on-the-job training opportunities and promotion of educational programs at partner institutions is imperative.



Veterans, seniors, handicapped individuals, and those in or recently released from the prison system bring unique skills and attributes to the region's workforce, but often face additional barriers to employment. Programs that provide targeted training, job-placement, and assistance should be supported and developed to connect these individuals with local employers. In addition, the effects of the pandemic took a toll on the mental welfare of the regions workforce. Mental health and substance abuse resources are necessary to ensure a healthy, proactive, and sustained workforce.

Action Item 4

Promotion and cultivation of **Authentic Communities**

The events of 2020 emphasized the importance of community and communication. Northeast Georgia prides itself on its unique mix of small-town atmosphere, rural landscapes, and urban areas rooted in history. As the pandemic took hold of our region, two items rose to the forefront: the development of comprehensive communication channels and ensuring the recovery of our downtowns. Throughout the pandemic, it was necessary to get consistent, accurate information out to citizens, business owners, and other local stakeholders. To achieve this, communities utilized a combination of social media pages, radio, television, newsletters, email distributions, and traditional print media. Continued efforts to disseminate accurate information in a variety of forms is needed to encourage citizens emerging from the pandemic and rebuilding a sense of community. Downtowns and Main Streets are the heart of our communities. Despite the exceptional adaptability of the region's downtown small businesses, they suffered some of the greatest effects of the COVID-19 pandemic. The following strategies are intended to continue the revitalization of Northeast Georgia's communities.

Vision: Vibrant, inclusive communities grounded in active downtowns and supported by community-focused, honest communication networks that facilitate the sharing of accurate, relevant, and timely information.

Key Facilitators: Local County and City Governments, Chambers of Commerce, Small Business Coalitions, Main Street Program Authorities, NEGRC PGS Division



Photo Credit: Georgia Theatre, Facebook, March 15, 2020, Retrieved from

<https://www.facebook.com/GerogiaTheatre/photos/a.10151899336319639/10157215754179639/?type3>

Strategy 4.a | Focus energies on downtowns

Tasks:

- Connect existing and future small business owners with resources (including funding, incentives, and entities providing small business support)
- Support downtown revitalization and infill efforts
- Develop and maintain tools to achieve communities' visions for their downtowns (ex. Master Plans, Historic Districts, development regulations)

Performance Measures:

- Number of grants/ designations/ other initiatives directly benefitting local business
- Number of new or updated planning documents focused on a downtown area
- Decrease in vacant storefronts
- Decrease in slum/blighted areas

Downtowns are the heart of a city; their success benefits the community as a whole, as well as surrounding areas. Northeast Georgia is home to unique downtowns that serve as historic, cultural, and economic hubs. Iconic, local, small businesses fuel the success of these main streets and town centers and have been some of the hardest hit and slowest to recover from the effects of the coronavirus pandemic. Working to connect small businesses with recovery and resiliency resources is vital to recovery and resilience-building. In particular, the efforts of entities including Downtown Development Authorities and Main Streets should be bolstered in order to accelerate revitalization efforts and prepare for future economic downturns.



Strategy 4.b | Support the development of & transition to digital information networks

Tasks:

- Development of structured outlines for public entities' web content to promote consistency, recognition, and authenticity of online content
- Conduct training sessions on online best-practices for businesses (ex. managing social media accounts, online sales)
- Establish and maintain platforms and campaigns to promote local businesses, organizations, and initiatives

Performance Measures:

- Development of local promotional platforms
- Reported increases in online sales/ patronage of local businesses due to online presence
- Offering of trainings for local businesses/ organizations

The digital push in response to the pandemic highlighted the necessity of local governments to have a developed knowledge and well-structured understanding of digital information networks. With demand for information and guidance from local officials increasing, governments should be quick to establish or connect their populous and business networks to resources on best-practices for building and utilizing online presence, and participating and excelling in a digital economy. Capacity-building trainings are available via higher education institutions throughout our state, as well as from state entities like the Georgia Department of Economic Development.



Strategy 4.c | Utilize digital technology to break down barriers to civic resources & participation

Tasks:

- Conduct internal assessments of local government web resources, presence, and utility offered to community
- Explore different communications tools, assessing the effectiveness and target audience associated with each
- Identify necessary improvements to, maintenance of, and operation of communications tools and equipment
- Review local meeting participation regulations and rules (ex. in person requirements, time limits for speaking) and address barriers to public participation
- Conduct online webinars announcing new initiatives, available programs, and training sessions

Performance Measures:

- Development of new utility for online pages (Bill Pay, Permitting)
- Development of communications templates for uniformity and to promote authenticity
- Virtual options for the public to view and/or participate in public meetings/ decision-making
- Increase in engagement of online resources, and external participation

The ability of local government to quickly, and effectively conduct outreach efforts to its populous was essential in the recovery efforts from the pandemic. Ensuring that local governments work to further develop their web presence as a utility to its community is an important tool to have. Local governments should look to build upon their understandings of the utility, online communication tools can offer and access how they can best make use of these resources. An important step is conducting an internal assessments to ensure their web resources, either via official website, or social media bulletin are uniform in the presentation and accessibility of information. When looking at existing resources, local governments should assess the cost of improvements to their existing internet presence.



The pandemic has also shown the resilient nature of community participation in local government functions. The continuation of online accessibility/ and participation in local meetings can prove to be a beneficial byproduct of the pandemic, and work to increase civic participation in local matters.

Action Item 5

Maintain Competitiveness at state, national, and global levels

Manufactures throughout the region have shown strong resilience through labor shortages, supply chain bottlenecks, rising input costs brought upon by the pandemic. Ensuring the continued innovation and resiliency out of our manufacturing and industrial sectors requires investment into traditional infrastructure, as well as to human capital, regional entrepreneurs, and research commercialization. The improvement of traditional infrastructure in the region is essential for resilience. Remote work and learning during the COVID-19 pandemic, coupled with the ongoing flight from urban to small towns and rural areas, have placed a heightened strain on public utilities. Proper maintenance and improvements to existing systems to optimize efficiency are needed. Public utility and infrastructures in the region must also be prepared to withstand the increasing extreme natural conditions associated with climate change. Long-range planning of fiscally sustainable system expansions and coordination of land use decisions with those plans will be essential to the continued economic prosperity in the region.

Vision: World-class infrastructure throughout the region, maintained and managed to meet expected future demand.

Key Facilitators: Local County and City Governments, EMCs, GEMA, Local Authorities, Georgia Department of Transportation, NEGRC PGS Division



Strategy 5.a | Prioritize investments in infrastructure through a comprehensive review of projected growth & needs

Tasks:

- Conduct local studies to understand residential and industrial growth and expansion expectations
- Assess current and future capabilities and demand for public utilities
- Assess cost of maintenance to current local infrastructure
- Assess cost of improvements and expansions of projected infrastructure
- Utilize Internet of Things (IoT) devices to optimize and monitor infrastructural performance
- Perform infrastructure maintenance, improvements, and expansions consistent with local, regional, and state plans and studies

Performance Measures:

- Completion of studies detailing future expected growth and infrastructure capacity requirements
- Completion of cost estimation measures for future development projects

As Northeast Georgia emerges from the pandemic, ensuring the capability of existing traditional infrastructure to meet future and existing demand is crucial. Studies detailing required maintenance and expected demand in the coming years are necessary. Local governments and providers should be judicious in ensuring utility and transportation systems are expanded and maintained in a fiscally responsible manner. Coordination with neighboring jurisdictions to develop multi-jurisdictional systems and safety nets is recommended to boost system-wide resilience and support continued growth.



Strategy 5.b | Assess vulnerabilities in public works to natural phenomenon & climate change

Tasks:

- Partner with local utility providers to assess ability of utilities to continue operation under extreme conditions (including managing staff safety during public health emergencies and resilience during natural disasters)
- Establish of emergency operating protocol for disaster scenarios (including public health emergency, public safety emergency, or natural disaster)
- Advance understanding of the risk extreme natural conditions pose to existing infrastructure
- Assess cost of improvement to infrastructure needed to withstand operation during extreme conditions (including extreme increases in demand as experienced during the coronavirus pandemic)
- Perform improvements that mitigate the effects of natural phenomenon and climate change on key infrastructure

Performance Measures:

- Knowledge of budgetary requirements for improvements of critical infrastructure to withstand natural phenomenon
- Identification of at infrastructure at risk in cases of natural phenomenon
- Up-to-date PDMs for all counties
- Development and upkeep of emergency protocol that addresses natural disasters, climate change, and public health emergencies (including disease outbreak)
- Inventory of new facilities that offer emergency support services
- Utilization of IoT

The coronavirus pandemic identified vulnerabilities of infrastructure throughout the region, creating unprecedented demand on water, broadband, and other key infrastructure. It's become clear that infrastructure improvements and planned expansions must account for a variety of disaster scenarios, from disease to natural phenomena. Emergency operating protocols should learn from recent disasters, including the ice storms in Texas and increasing intensity and frequency of hurricanes, flooding, and tornadoes in the southeast. As infrastructure increasingly relies on the Internet of Things (IoT), cybersecurity is also essential. State agencies, like GEMA, are available to assess vulnerabilities and risks faced. Local governments should understand and prepare for the cost of necessary improvements to existing infrastructure.



Strategy 5.c | Encourage innovation & entrepreneurship

Tasks:

- Direct private capital investments to business incubation efforts, with a focus on expansion-stage funding opportunities
- Develop public, private, and non-profit partnerships to provide support networks and guidance opportunities to regional entrepreneurs
- Evaluate local regulatory and amenity environment in relation to business startups and entrepreneurs
- Identify the needs of and solutions for underserved entrepreneurs
- Examine feasibility of dedicating portions of underused facilities in a community to incubatory efforts

Performance Measures:

- Increase in private capital investment in business incubation efforts
- Number of new industrial sectors/technologies arising out of the region
- Increase in the number of dedicated workspaces for incubatory efforts
- Identification of regulatory hurdles and local amenities in relation to business startups
- Formation of multilateral partnerships to support entrepreneurs and business incubation

Innovation has been key to the region's resilience throughout the pandemic. Businesses pivoted formats, and even the goods and services they provided. The University of Georgia continued as a leader in bringing new products to market, as well as for new licenses and options, ranking top ten in the U.S. for the 13th consecutive year. While unemployment came as a surprise to many in March and April of 2020, it created opportunity to explore passion projects, launching into new entrepreneurial pursuits. Local government should look to form partnerships with private industry and non-profit groups to develop support networks, capacity for funding, and opportunities for guidance to regional entrepreneurs.



Preventing brain drain and retaining IP development in the region will secure opportunities for continued economic success. Business development organizations have identified a lack of capital investment in expansion-stage companies as a threat to regional economic development efforts. Local governments should look to evaluate available amenities and regulation in relation to business startups, including identification of underused facilities and allocation of space to provide for business incubation hubs. Allocation of resources and network-building for business incubation efforts will help to develop the next leg of the region's economy and ensure continued economic success.

Tracking Progress

On a (typically) monthly basis, the Northeast Georgia Planning & Government Services (PGS) Committee meets to discuss business activity, infrastructure projects, and other planning and government service-related matters within the region. Monthly meetings also provide an opportunity to report matters of importance or interest to the full Council.



The PGS Committee will serve as the monitoring entity for the Northeast Georgia Economic Recovery + Resilience Plan. In this capacity, PGS Committee members will incorporate review of this plan into its annual CEDS review, identifying progress made in implementing the five Action Items described in the Action Plan. Pertinent findings will then be presented to the full Council. Key Facilitators for each Action Item will provide the NEGRC PGS Division performance measure results to be compiled and provided to the PGS Committee prior to each progress review.

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Appendix A

Northeast Georgia COVID-19 Impact Assessment

The Impact Assessment examines the effects of the coronavirus pandemic on the Northeast Georgia economy at the regional and county levels. Findings are based on the results of a region-wide survey (distributed September 2020) and data from state, federal, non-profit, and private-sector organizations.

COVID-19 IMPACT ASSESSMENT

REGIONAL ECONOMIC RECOVERY + RESILIENCE
PLANNING SERVICES (CARES ACT)

NORTHEAST GEORGIA REGIONAL COMMISSION



**Georgia
Tech**  **Center for
Economic Development
Research**

NOTE: This report contains time-sensitive data on COVID-19 trends in communities accessed from September through December 2020. Databases that Georgia Tech subscribes to and typically uses for sociodemographic analysis may lag by several months or more. Every effort was made to collect the most recent real-time information using publicly available data from widely-recognized and reliable sources. The use and applicability of this data on the Northeast Georgia region may change as the COVID-19 pandemic evolves.

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1. KEY TAKEAWAYS

KEY TAKEAWAYS

Report Highlights

- Most survey respondents report a need for **better internet access in parts of their communities**, as well as an increase in the need for social services as a result of the pandemic.
- **Clarke and Oconee counties had the largest sales tax declines in the region** at -4.7 percent and -3.2 percent, respectively. Greene County declined -2.7 percent, likely due to the loss of tourism and the closure of the Ritz-Carlton due to COVID-19.
- **Although initial unemployment claims in the region are still above pre-pandemic levels, the number of new claims have decreased each month since April.** Accommodation and Food Services, Health Care and Social Assistance, and Retail Trade are the three most impacted sectors in terms of anticipated job loss.
- **For the first time since January 2020, job postings in Northeast Georgia exceeded that of last October.** Average monthly postings remain about 10 percent lower than last year.
- Most of the Northeast Georgia region's **low-income job loss is in Clarke, Newton, and Walton counties.**
- **Elbert, Jasper, and Newton counties** rank highest on the COVID-19 Community Vulnerability Index (CCVI). **Morgan, Greene, and Clarke counties** rank highest on the Chmura Economic Vulnerability Index.
- National housing protections under the CARES Act have allowed residents to stay in their homes through **eviction moratoriums and mortgage forbearance.**
- **Blacks and Hispanics have been heavily impacted by COVID-19 in Northeast Georgia**, with case rates 1.2 to 1.9 times the case rates for Non-Hispanic whites. Case and/or death rates have also been high among American Indians / Native Alaskans and Native Hawaiians / Pacific Islanders.

2. INTRODUCTION

INTRODUCTION

About the Team

The Enterprise Innovation Institute (EI2) is Georgia Tech's chief business outreach and economic development organization. Since its inception in 1960, its core mission is to help business, industry, entrepreneurs, and economic developers across Georgia grow and remain competitive. EI2 continues Georgia Tech's sixty-year legacy of commitment to community economic development by providing research and technical assistance to support economic development efforts in communities in Georgia and around the world.



The Center for Economic Development Research (CEDR) is an applied economic development unit of EI². CEDR assists local elected officials, economic developers, policy makers, and community and state leaders who seek innovative tools and methods to leverage their local advantage and quality of life for their residents by attracting, maintaining, and growing business and industry within their areas.

CEDR's economic development team are experts with decades of experience in advising economic development and community leaders on how to stay competitive in an ever-changing global economy. CEDR's staff includes:

- **Economists**
- **City Planners**
- **Economic Development Finance Professionals**
- **Downtown Development Specialists**
- **Public Policy Researchers**

The expertise of the CEDR team is concentrated in the areas of strategic planning, organizational development, labor market and workforce analysis, facilitation, research, and economic and fiscal impact analyses. All have a depth of experience performing applied research for the economic development community. When needed, staff can supplement their skills by calling on Georgia Tech academic faculty to assist in specific research projects. Through their research, CEDR helps their clients understand the opportunities and challenges in fostering local and regional economic development.

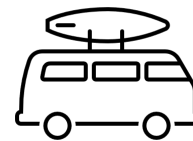
For purposes of this report, the research team at CEDR will simply be referred to as "Georgia Tech".

Georgia Tech is pleased to present this Impact Assessment assisting the Northeast Georgia Regional Commission in their pursuit of economic growth and development in the wake of the COVID-19 pandemic, under Coronavirus Aid, Relief, and Economic Security (CARES) Act supplemental funding through the U.S. Department of Commerce Economic Development Administration (EDA). As an EDA University Center, Georgia Tech has supported economic development efforts in Georgia for decades, including research, facilitation, technical and management expertise. These services are available through its headquarters in Atlanta, GA and a network of regional offices located throughout the state.



Georgia is filled with quaint downtowns that are rich in character and culture. In the years since the Great Recession, rural downtowns across the country have experienced a renaissance. Northeast Georgia towns like Athens, Madison, Braselton, and Covington have become popular tourist destinations, due in part to the draw of the “Americana” aesthetic and history of the communities, and more recently, the advent of the film industry in the state. However, the COVID-19 pandemic has swept through cities and urban centers and has taken its toll in some rural communities. While rural areas comprise 15 percent of the U.S. population, they may be vulnerable to the outbreak due to their lack of resources.

With the COVID-19 pandemic hitting nearly every corner of the globe, rural communities are proving their resilience. Popular events (large concerts, festivals, and other mass gatherings) are on hold. Holiday vacations to theme parks and tourist destinations may be difficult. AAA estimated that summer travel would decrease by 15 percent or more, the first decline since 2009.¹ Many vacation and tourist destinations are either closed indefinitely or limiting their capacity, and air travel is at an all-time low due to international quarantine requirements. When travelers do take to the road during 2020, 97 percent of those trips will be by car.² With economic uncertainty looming, Zeta Global estimates that there will be 31 million fewer holiday travelers this season.³ People are seeking relaxation and refuge in other ways. States like Wisconsin, West Virginia, and Wyoming have initiated marketing campaigns to draw tourists based on their remote locations.



2020 HOLIDAY SEASON

31M ▼
PROJECTED REDUCTION
IN TRAVELERS

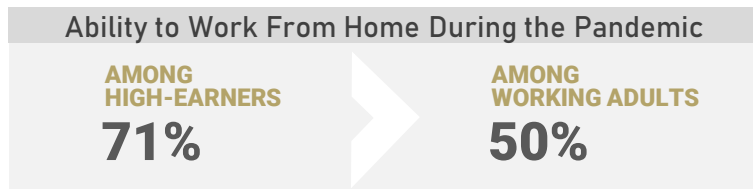
¹ <https://newsroom.aaa.com/2020/06/aaa-forecasts-americans-will-take-700-million-trips-this-summer/>

² Ibid.

³ <https://www.cnn.com/travel/article/winter-holiday-travel-2020-covid-19/index.html>

COVID-19 has had an impact on our communities and how we work. As workers leave the traditional office setting and transition to alternate work arrangements, telecommuting has opened a new avenue for communities outside of major employment hubs to potentially attract new residents looking to relocate, with one caveat: internet access. According to a recent article by Brookings, half of all working adults and 71 percent of high-income earners could work from home during the pandemic.⁴

Although high-speed internet is already in many of the region's downtowns, not all residents in Northeast Georgia have adequate service, and that can be detrimental to the region's economic future. Some communities are using high-speed internet as a tool to attract talent. For example, Traverse City, Michigan – a small, coastal community off the beaten path – is creating “brain gain” by turning its community into a tech center for remote workers through the Rural Innovation Initiative. While wealth has historically been concentrated in a major cities, smaller communities boasting fast internet speeds can attract remote workers who want a lifestyle shift that gives them both affordability and quality of life.⁵



Recognizing some of the challenges due to COVID-19, but also some of the opportunities, the NEGRC initiated an assessment to better understand how the pandemic has impacted communities in their region. The NEGRC will use this assessment to lay the groundwork for its short-term economic resilience strategies and long-term economic recovery strategies under the CARES Act. This Impact Assessment consisted of three fundamental tasks: (1) surveys of local government stakeholders, (2) formulation of findings and key takeaways based on research and community feedback, and (3) creation of a county-based impact assessment using the most up-to-date data and research to address short and long-term economic development planning goals.

Georgia Tech used an established process to guide the recommendations provided in this Impact Assessment. The first step in this process is the use of research to gain the greatest understanding of the challenges and opportunities facing the Northeast Georgia region. The second step is the focus on identifying common themes based on research and survey results. Finally, the third step is to assess the impact through the formulation of concrete findings to inform the region on how it should focus its economic development efforts.

To accomplish these goals, Georgia Tech worked with leadership from the region's local government and civic sectors to develop its planning approach:

1 KICK-OFF MEETING WITH THE NEGRC

A kick-off meeting was held via video call with the NEGRC and Georgia Tech teams on July 22nd, 2020 to review the planning process and metrics for the impact assessment, goals for the CARES Act supplemental funding, discuss the regional survey, and establish the project timeline.

2 COMMUNITY IMPACT SURVEY

During the month of September 2020, Georgia Tech administered a 20-question survey for those involved in the day-to-day operations of the region's cities and counties to share how the COVID-19 pandemic has affected their communities. These surveys provided valuable insight into current socioeconomic and emergent fiscal challenges, as well as their perspectives on business insights and trends within their communities.

3 ASSESSING THE REGIONAL IMPACT

Drawing from the surveys and additional research from the most recent data sources, Georgia Tech worked with the Northeast Georgia Regional Commission to craft an Impact Assessment focused on identifying the biggest economic gaps and creating the most economic prosperity and resilience in Northeast Georgia.

⁴ <https://www.brookings.edu/blog/up-front/2020/04/06/telecommuting-will-likely-continue-long-after-the-pandemic/>

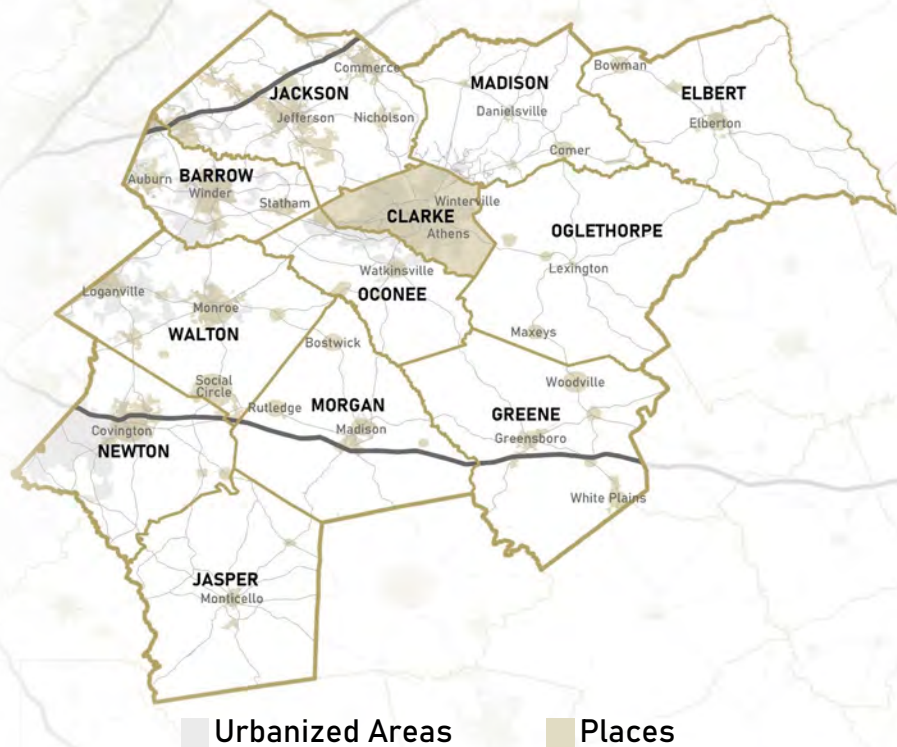
⁵ <https://www.usnews.com/news/cities/articles/2020-06-29/how-teleworking-may-accelerate-the-shift-away-from-big-cities>

BACKGROUND

Study Area

Georgia Tech used the 12-county Northeast Georgia region as the boundary for the study area. With a population of approximately 657,941, the Northeast Georgia region is comprised of 54 municipalities in the following counties: Barrow, Clarke, Elbert, Greene, Jackson, Jasper, Madison, Morgan, Newton, Oconee, Oglethorpe, and Walton.⁶ Located in east-central Georgia, the Northeast Georgia region is approximately 3,260 sq. mi., comprising the Athens Metro, Jefferson Micropolitan Area, and portions of the Atlanta Metro.

12 COUNTIES **54** MUNICIPALITIES **658K** POPULATION



Source: US Census

⁶ NEGRS COVID-19 Response Hub: <https://northeast-georgia-regional-commission-coronavirus-re-924a4-garc.hub.arcgis.com/>

State-Level COVID Policies

Several states have enacted budget legislation in response to the pandemic (shown in gold). HB 792 was enacted in Georgia to transfer \$100 million from the revenue shortfall reserve to combat the spread of the coronavirus.⁷ The purpose of these reserve funds is to help weather financial “shocks” to the state budget caused by unforeseen economic disruptions like the COVID-19 pandemic.

States with Enacted Budget Legislation Response to COVID-19



⁷ <https://www.ncsl.org/research/fiscal-policy/state-fiscal-responses-to-covid-19.aspx>

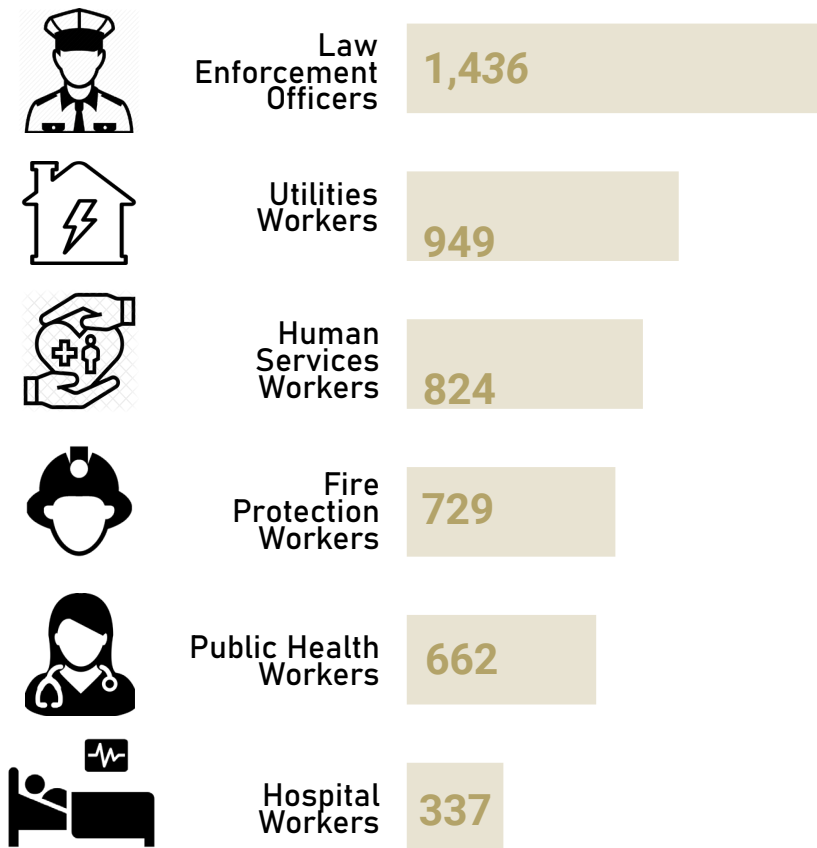
Reopening policies differ by state. A summary of Georgia’s reopening policies is provided below. Current legislative guidance updated by state can be found here: <https://www.huschblackwell.com/state-by-state-covid-19-guidance>.

Georgia COVID-19 Policies & Actions Summary⁸

	Policy/Action		Description
GENERAL	Face Mask Requirements	No	Local governments can impose limited mask mandates.
	State Travel Restrictions	No	
	Social Distancing/Gatherings and Meetings Restrictions	Yes	Gatherings limited to 50 people or less.
INSTITUTIONAL RESRICTIONS	School Reopening Allowed	Yes	Georgia allows individual school districts and local communities to decide whether school buildings will be physically open or will operate remotely.
	Lifting of Prohibition on Non-Essential Medical Procedures	Yes	Georgia never issued guidance or orders ceasing elective surgeries.
BUSINESS RESTRICTIONS	Restaurants at Least 50% Capacity	Yes	Restaurants operate at full capacity. Georgia allows home delivery of beer, wine, and liquor directly to people’s homes from restaurants, bars, convenience stores, some package and retail stores, and grocery stores.
	Bars Open	Yes	Bars operate at 35% capacity. Guidelines recommend to not allow guests to congregate at bar areas if social distancing is not possible.
	Gyms Open	Yes	Group class attendance limited to insure patrons are 10 ft. apart.
EMPLOYMENT	Unemployment Insurance Extension	Yes	Individuals collecting at least \$100 per week in unemployment support and can certify they have lost their job or wages because of the pandemic, are entitled to the extra \$300 per week. Benefits are retroactive to the week of August 1.
	Require Paid Sick Leave for COVID-19 Symptoms or Positive Test	No	
	Liability Protections	No	
	Workers Comp	No	
FISCAL POLICY	Revenue Shortfall	\$5B	
	CARES Act Funding	\$3.5B	
	CARES Act Funding as % of Shortfall	70%	

Among the essential workers ensuring health, safety, and continuity during the pandemic are thousands of essential government workers in Northeast Georgia. Public law enforcement officers, utilities workers, human services workers, fire protection workers, public health workers, and hospital workers have continued their work during the pandemic to help mitigate its impacts.

Essential Government Workers in Northeast Georgia



⁸ Statewide data current as of November 4th, 2020. <https://www.stateside.com/blog/introducing-state-snapshot-covid-19-report>

Source: US Census Bureau, Census of Individual Governments: Employment

3. SURVEYS

Northeast Georgia Coronavirus Impact Survey

Conducted By **Georgia Tech** | Respondents **Public Sector**

- OVERVIEW
- BUSINESS IMPACTS
- COMMUNITY & SOCIOECONOMIC IMPACTS
- OTHER IMPACTS

Mainstreet Business Impacts Survey

Conducted By **Mainstreet America** | Respondents **Small Business Owners**

- OVERVIEW
- IMPACTS

Northeast Georgia Coronavirus Impact Survey

Conducted By **Georgia Tech** | September 2020
 Respondents **Public Sector**

By Role

OVERVIEW

About the Survey

The Northeast Georgia Coronavirus Impact Survey was conducted in September 2020, as COVID-19 cases and deaths in Georgia declined from peaks in July and August. The survey was distributed by the NEGRC to public officials across Northeast Georgia via SurveyMonkey.

Nearly 90 survey participants completed the 20-question survey covering COVID-19's impacts on business, community and socioeconomic factors, fiscal health, and other topics. Over half of respondents were top level managers or elected officials (including chamber board members). Most of the remaining respondents were in clerk/administrative roles or mid-level managers. Over 70 percent of participants were in city or county government, with more than half in city government alone.

Managing Chief Executives

- Municipal Managers
- Assistant Municipal Mangers
- Superintendents

37

Elected Officials

- Mayors
- Chairs
- Board Members

22

Clerks/Admins

- Finance Officials
- Clerks
- HR Officials

20

Staff

- Division Directors
- Managers
- Staff

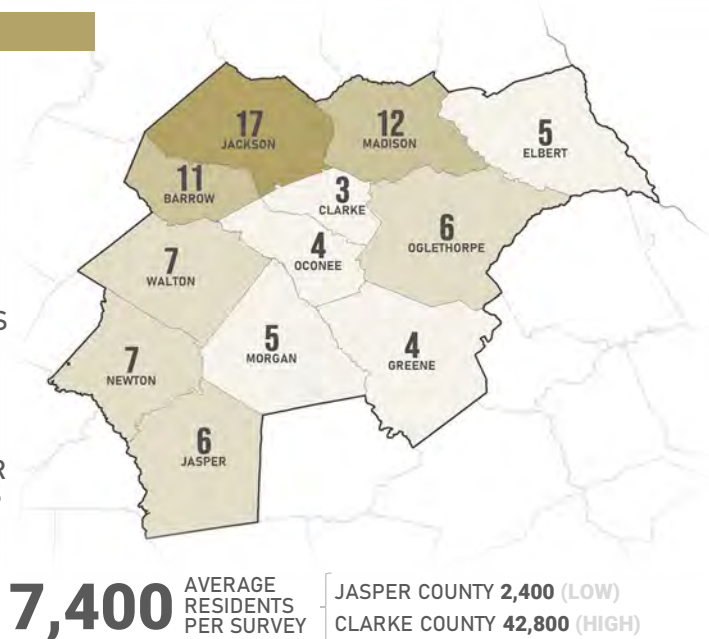
8

Respondents

12
COUNTIES

70
ORGANIZATIONS

87
PUBLIC SECTOR
RESPONDENTS



Source: US Census

By Affiliation

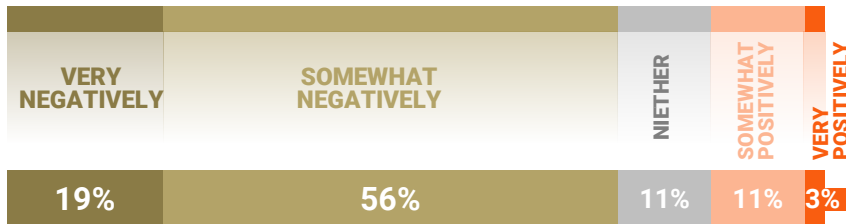
	City Govt	County Govt	Chamber of Commerce	Development Authority	Education	Total
JACKSON	8	2	2	2	3	17
MADISON	6	1	4	1		12
BARROW	7	2	2			11
WALTON	4	2		1		7
NEWTON	4			2	1	7
OGLETHORPE	4	2				6
JASPER	3	2		1		6
ELBERT	2	1	1	1		5
MORGAN	3	1		1		5
GREENE	2	1	1			4
OCONEE	2	1	1			4
CLARKE	1	1	1			3
TOTAL	46	16	12	9	4	

BUSINESS IMPACTS

Respondents reported widespread negative business impacts as a result of the pandemic, with 56 percent reporting “somewhat [negative] effects and a smaller share (19 percent) reporting “very [negative] effects and a smaller share (19 percent) reporting “very [negative] effects.

Overview

Overall, how have businesses in your community been affected by the COVID-19 pandemic?



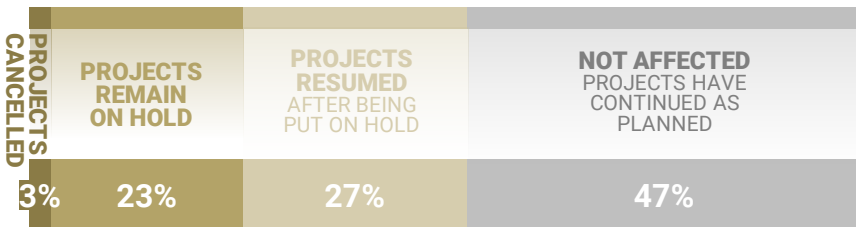
94%

REPORTED LESS THAN 25% OF THEIR COMMUNITY'S BUSINESSES REMAINING TEMPORARILY OR PERMANENTLY CLOSED AS A DIRECT RESULT OF THE PANDEMIC

67%

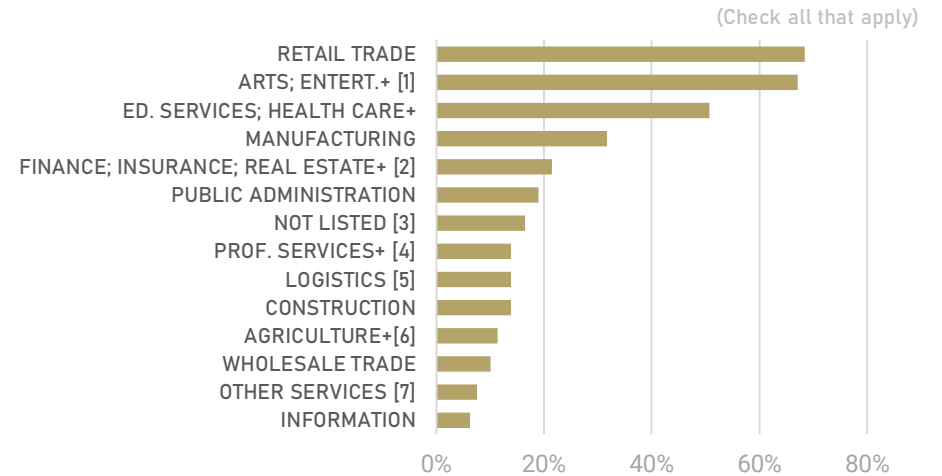
REPORTED "NO NOTICEABLE CHANGE" IN DOWNTOWN COMMERCIAL TENURE

How have planned business location, expansion, or relocation projects in your community been affected due to the pandemic?

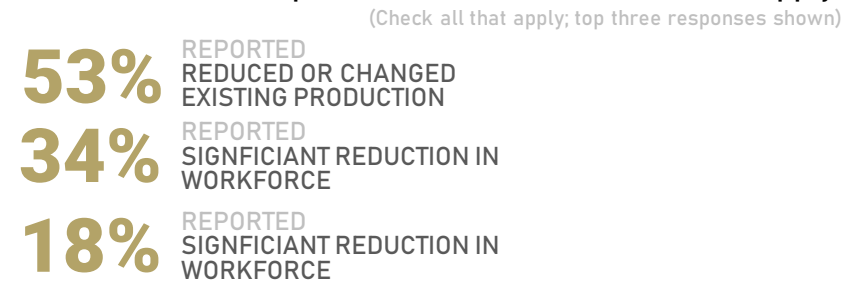


Retail trade, arts/entertainment/recreation/accommodation/food services, and educational services/health care/social assistance are among the most impacted industries, with more than half of respondents reporting impacts to each industry. 32 percent of respondents reported manufacturing among the industries most affected in their community. 53 percent reported reduced or changed production among their industrial/manufacturing businesses.

What types of businesses have been most affected in your community? Please check all that apply.



How have industrial/manufacturing businesses in your community changed their operations in response to the pandemic? Please check all that apply.



[1] Arts, entertainment, and recreation, and accommodation and food services; [2] Finance and insurance, and real estate and rental and leasing; [3] Other, specified by respondents; [4] Professional, scientific, and management, and administrative and waste management services; [5] Transportation and warehousing, and utilities; [6] Agriculture, forestry, fishing and hunting, and mining; [7] Other services, except public administration

COMMUNITY & SOCIOECONOMIC IMPACT

Survey responses indicate the pandemic’s widespread community and socioeconomic impacts. The reported effects varied across communities.

Social Services & Wellness

About two-thirds of respondents reported at least some change in social services need as a direct result of the pandemic, with almost a quarter reporting “a lot” or “a great deal” of change in need. Communities across the region reported difficulty collecting utility payments as a result of the pandemic. At least two communities reported introducing moratoriums on cut-offs for nonpayment and/or flexible payment programs for their utilities as a form of assistance.


Do you notice a change in your community in the need for social services as a direct result of the pandemic? These services may include SNAP/food stamps, WIC, TANF, local food/clothing pantry.

A GREAT DEAL	A LOT	SOME	A LITTLE	NONE
8%	16%	40%	12%	23%

“...We had many of our residents lose their jobs and were not able to pay their bills. We implemented a freeze on disconnects and late fees and penalties as a way to ease their burden. We have struggled to find other ways to provide financial relief (e.g., grants, etc.) with rent, groceries, and especially bills (tricky b/c we are the provider).” - Survey Respondent

Hospital Capacity


In most counties, few respondents reported nearby hospitals reaching capacity, but at least a third of respondents in four counties (Clarke, Jasper, Morgan, and Barrow) reported nearby hospitals reaching capacity.

24% 
REPORTED NEARBY HOSPITALS REACHING CAPACITY (or patients transferred out of the community)

LARGEST SHARE
67%
IN CLARKE & JASPER COUNTIES

Internet Access

Three quarters of respondents reported issues with lack of high-speed internet access in parts of their community. Almost a third of respondents reported the addition of internet hot spots for improving community internet access, and almost a quarter were in the process of identifying underserved areas.

75% 
REPORTED LACK OF HIGH-SPEED INTERNET ACCESS IN PARTS OF THEIR COMMUNITY

HHs Without Internet Access | NEGA Counties¹

Elbert, 38.7	Greene, 28.5	Madison, 24.7	Jackson, 19.2	Walton, 16.6
Oglethorpe, 31.4	Jasper, 26.9	Morgan, 22.7	Clarke, 15.8	Newton, 14.0
			Barrow, 15.5	Oconee, 9.7

32%
REPORTED ADDING PUBLIC INTERNET HOTSPOTS

22%
REPORTED EFFORTS TO IDENTIFY UNDERSERVED AREAS

¹ "Households without internet access" source: [http://www.policymap.com/our-data-directory.html#Census:%20Decennial%20Census%20and%20American%20Community%20Survey%20\(ACS\)](http://www.policymap.com/our-data-directory.html#Census:%20Decennial%20Census%20and%20American%20Community%20Survey%20(ACS))

Mainstreet Business Impacts Survey

Conducted By **Mainstreet America** | March 2020
 Respondents **Small Business Owners**

OVERVIEW

About the Survey

Main Street America (MSA) conducted an online survey during the week of March 25 to April 6, 2020 to assess the impact of COVID-19 on the small businesses within their network. MSA provided a summary of their results for all states and for communities where they received five or more complete surveys. Three communities in the Northeast Georgia region met the survey response threshold: Braselton, Jefferson, and Winder.

Within these three communities, 35 of the region's small businesses participated in MSA's survey. Nearly half of these businesses have been operating for more than 10 years and employ two to five people. Three-fourths of the region's businesses that participated in the survey are locally-owned, and 60 percent are woman-owned.

Respondents



75% LOCALLY OWNED

60% WOMAN OWNED

NEARLY **50%** **10+** YEARS IN BUSINESS + **2-5** EMPLOYEES

IMPACTS

Business Impacts

Survey respondents assert that COVID-19 has impacted their business in a multitude of ways, most notably through loss of revenue (86 percent), business closures (69 percent), and employee layoffs/workforce displacement (49 percent of responses).

How has COVID-19 affected your business?

(Check all that apply)

OPERATIONAL ADJUSTMENTS	Change of business hours	37%
	Change of business model	34%
	Established alternative mode of business operation	20%
	Off-site working options	14%
	Enhanced secondary mode of business operation to sell and deliver products (i.e., online, telephone)	9%
REVENUE CHANGES	Loss of revenue	86%
	Event cancellation	40%
	Reduced participation at gatherings and events	31%
SPENDING CHANGES	Employee layoffs / workforce displacement	49%
	Added expenses to mitigate public safety risks (i.e., cleaning supplies, gloves, masks, etc.)	29%
	Change in insurance rates	0%
OTHER DISRUPTIONS	Business closures (voluntary or mandated)	69%
	Supply chain disruptions	31%
OTHER	Other	6%

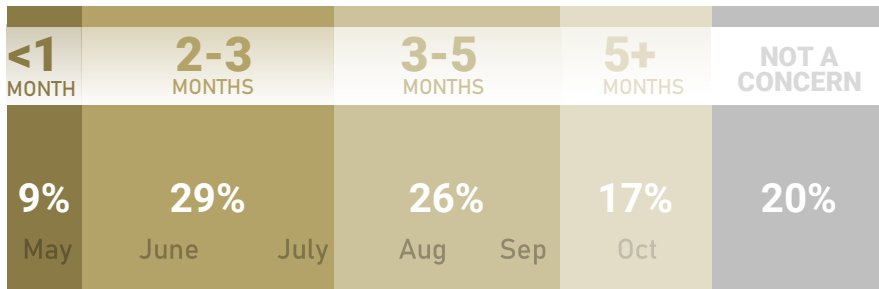
Source: National Main Street Center

More than half (51.4 percent) of the respondents reported their business revenue decreased by more than 75 percent since COVID-19 became a widespread concern. This loss of revenue puts employees at risk of unemployment or layoffs; 89 percent of businesses responding to the survey indicate that coronavirus could lead to their having to cut at least one job.

Risk of Permanent Closure

If business disruption continues at the current rate, how soon will your business be at risk of closing permanently?

(Survey conducted late March to early April 2020)

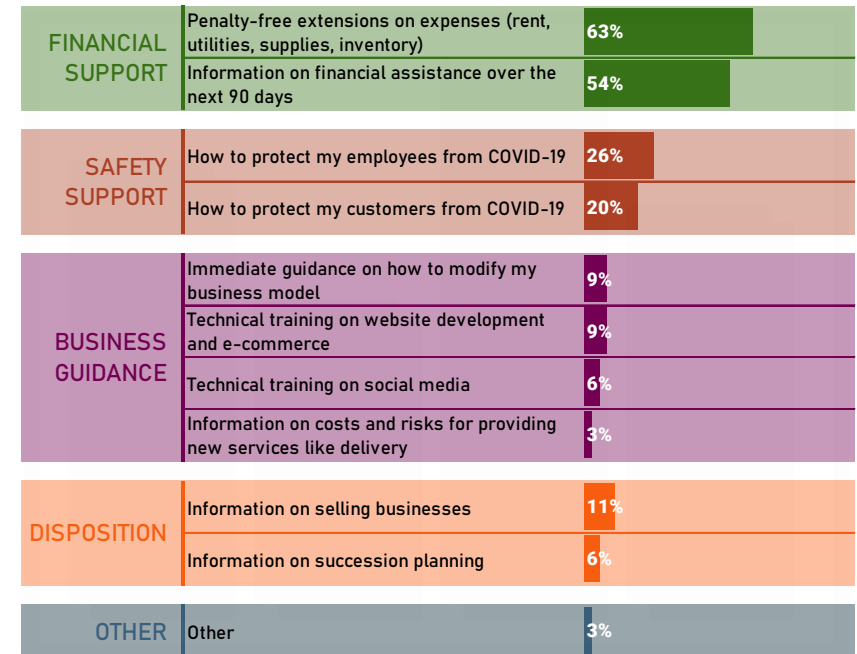


Source: National Main Street Center

Should business disruption persist at the rate experienced in late March/early April, 54 percent of businesses will be facing permanent closure within two to five months.

What types of assistance would be most helpful to your business?

(Check all that apply)



Source: National Main Street Center

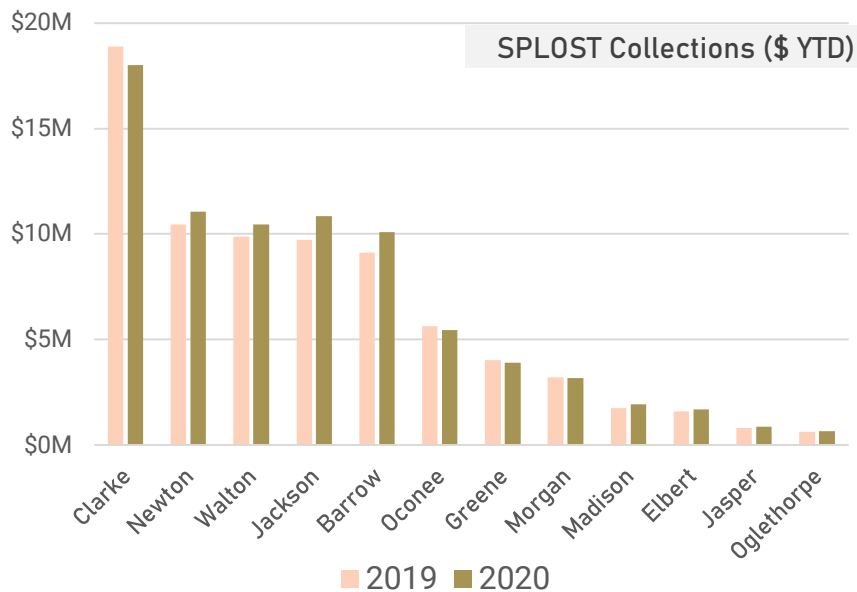
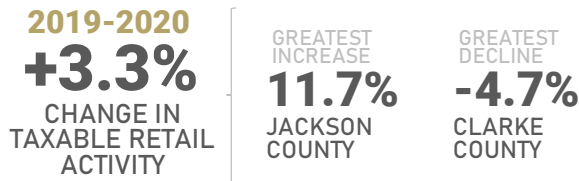
Respondents largely agree that the two most helpful types of business assistance would be information on financial assistance over the next 90 days and penalty-free extensions (rent, utilities, supplies, inventory).

4. IMPACT ASSESSMENT

- SALES TAX
- UNEMPLOYMENT
- OCCUPATIONAL LANDSCAPE
- HEALTH
- HOUSING
- RACE/ETHNICITY

SALES TAX

Despite the general concern about a decline in 2020 sales tax collections due to the economic slowdown brought on by the COVID-19 pandemic, through the first nine months of 2020, the level of taxable retail activity in the Northeast Georgia region has grown 3.3 percent over the first nine months of 2019. That level of growth represents more than one-quarter of a billion dollars in retail spending. Of the 12 counties in the region, eight experienced retail sales growth during the first nine months of 2020, and half of those experienced growth of more than 10 percent. Not surprisingly, the two counties that suffered the largest year-over-year decline were Clarke and Oconee, due in large part to the fact that students from the University of Georgia were sent home in the spring and did not return to finish the semester in person, and many have not returned this fall due to the availability of online courses. (Numbers in the charts may differ slightly due to rounding.)



Source: Georgia Department of Revenue

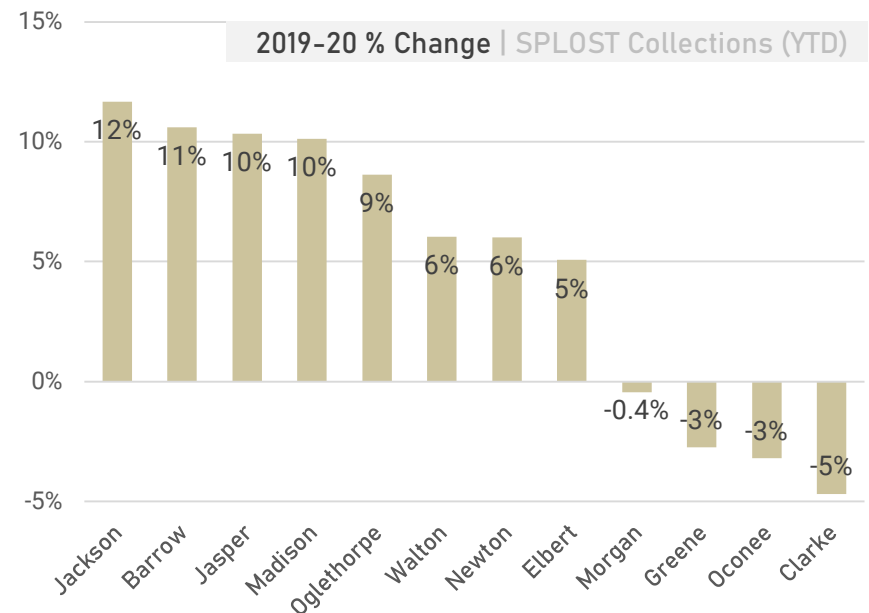
From the NEGA Coronavirus Impact Survey | Public Officials

“Our sales tax revenue is only slightly down.” - Survey Respondent

“...LOST figures have held steady or slightly increased.” - Survey Respondent

Sales Tax Collections By Industry

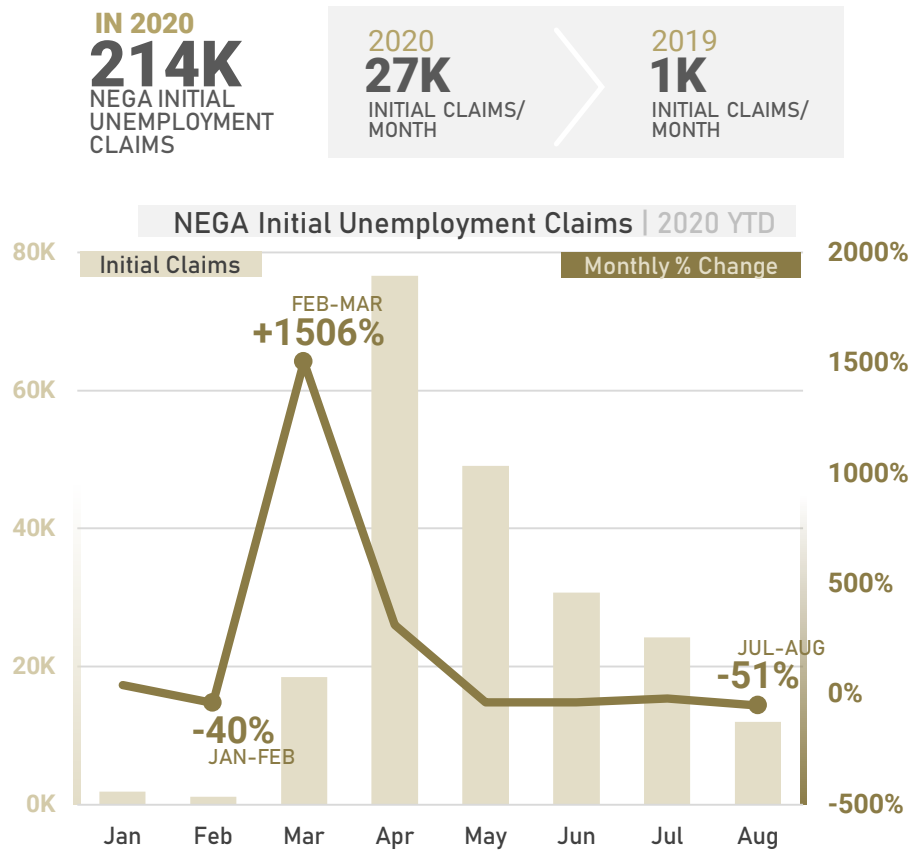
The main factor in keeping sales tax collections up was the passage of the Georgia Marketplace Facilitator Law which forced online marketplace facilitators like Amazon or eBay to collect and remit sales tax. The law went into effect on April 1, 2020, just in time for the COVID-19 shutdown and overall shift to online purchasing. It is estimated those collections represent 2-3 percent growth in sales tax revenue. If that is the case, even without the law, sales tax collections in the Northeast GA region would still have been virtually flat over 2019 levels. In short, the expected drop in consumer spending resulting from the COVID-19 economic slowdown did not materialize.



UNEMPLOYMENT

Initial Unemployment Claims

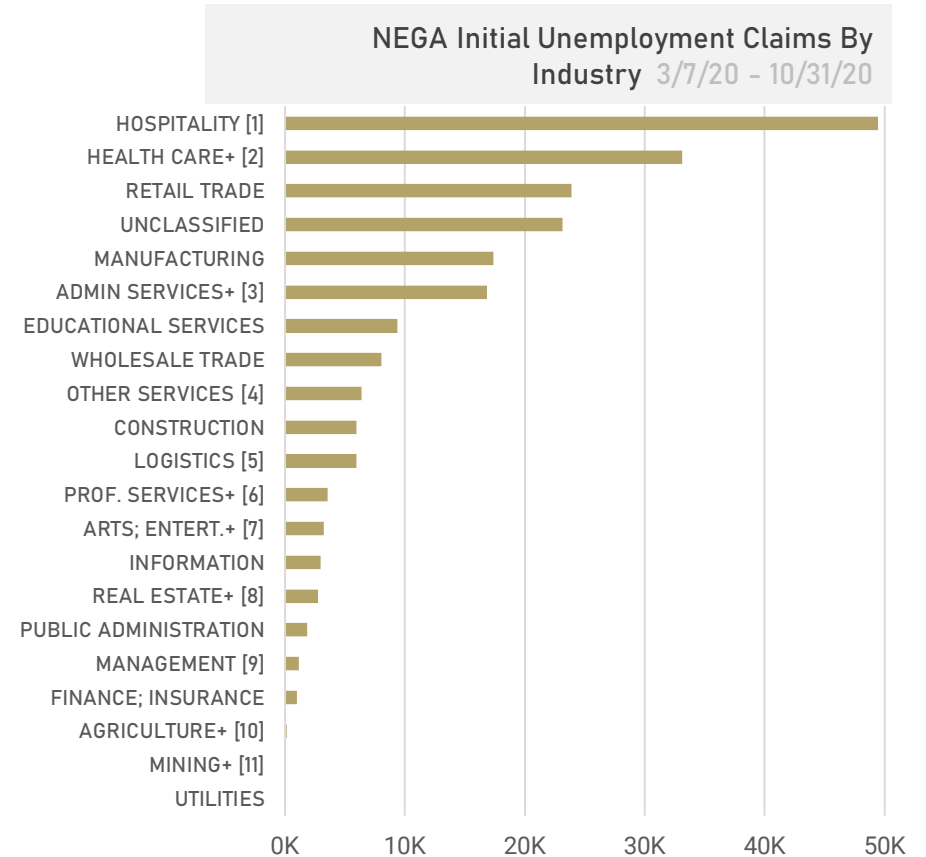
Initial unemployment claims represent the number of new people filing for unemployment benefits and signal the direction in which labor markets are headed. Initial claims have soared in the region as businesses reduced their payrolls, reaching a peak of 76,603 in April 2020 and increasing 315 percent from the previous month. Since the start of 2020, more than 214,000 initial claims were filed in the Northeast Georgia region and more than half (56 percent) of those were filed in Clarke, Newton, or Walton Counties. Last year, the region averaged 1,097 initial claims filed monthly. So far in 2020, new claims are averaging about 26,700 per month. Although the region is still above pre-pandemic levels, the number of new jobless claims have decreased each month since April.



Source: Georgia Department of Labor

Initial Claims By Industry

Initial claims data can also depict emerging unemployment in the region's industries. The chart below illustrates the number of claims filed each week since March by industry sector. Accommodation and Food Services, Health Care and Social Assistance, and Retail Trade are the three most impacted sectors in terms of anticipated job loss.

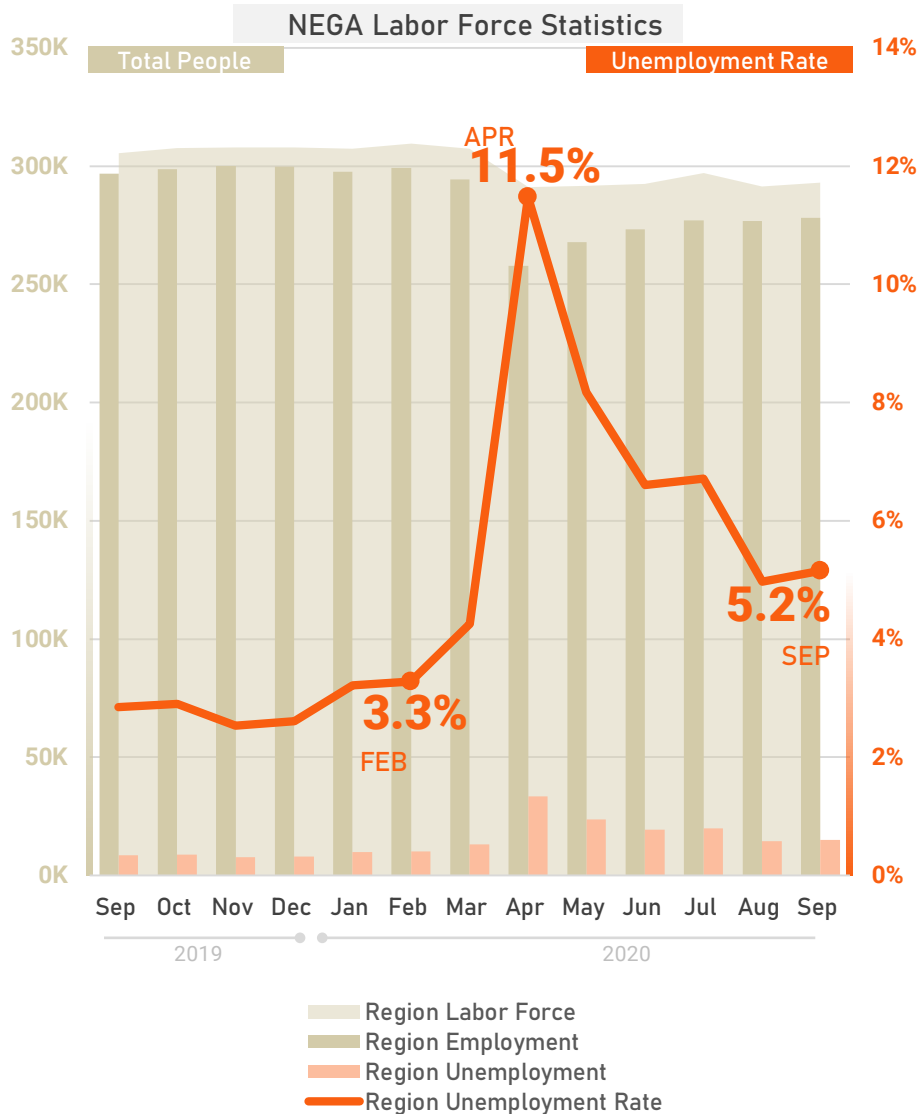


[1] Accommodation and Food Services; [2] Health Care and Social Assistance; [3] Admin and Support and Waste Mngmt and Remediation Srvc; [4] Other Services (except Public Admin); [5] Transportation and Warehousing; [6] Professional, Scientific, and Technical Services; [7] Arts, Entertainment, Recreation; [8] Real Estate and Rental and Leasing; [9] Mngmt of Companies and Enterprises; [10] Ag, Forestry, Fishing and Hunting; [11] Mining, Quarrying, and Oil and Gas Extraction

Source: Georgia Department of Labor

Unemployment Rate

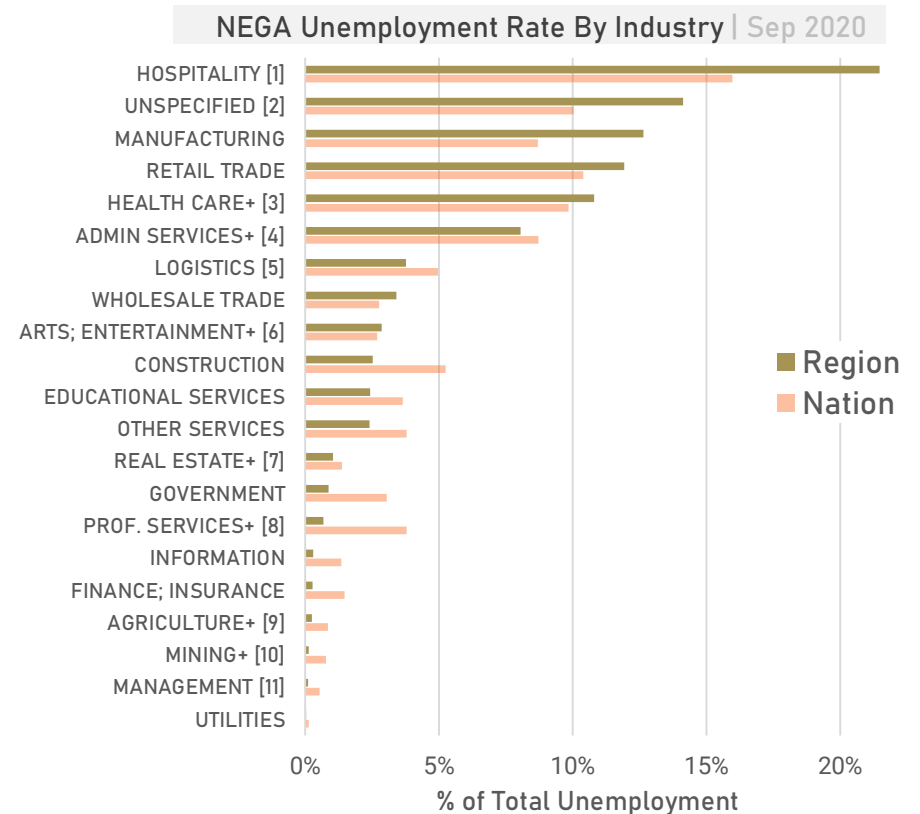
As of September 2020, the unemployment rate in the Northeast Georgia region is 5.2 percent, or 15,100 people. This is a lower rate than the same month for the United States and Georgia - 7.7 percent, and 6.3 percent, respectively. Within the region, Newton County posted the highest unemployment rate (7 percent), while Oconee County posted the lowest (2.8 percent).



Source: US Bureau of Labor Statistics

Unemployment Rate By Industry

Unemployment rate by industry provides a better understanding how the region's industries are currently recovering. Compared to the nation, Northeast Georgia has a lower unemployment rate in the following industries: Construction, Transportation and Warehousing, Information, Finance and Insurance, Professional Services, Educational Services, and Other Services (except Public Administration). Industries in the region with a higher unemployment rate than the nation are: Manufacturing, Retail Trade, Healthcare, and Accommodation and Food Services.



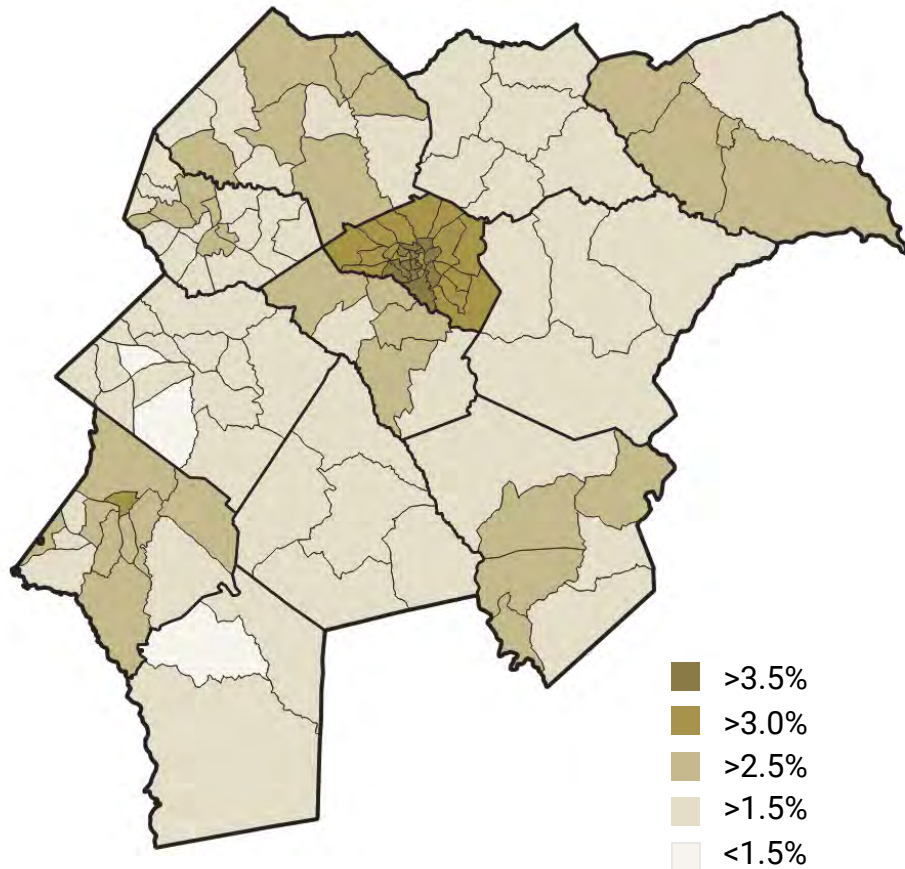
[1] Accommodation and Food Services; [2] No Previous Work Experience/Unspecified; [3] Health Care and Social Assistance; [4] Administrative and Support and Waste Management and Remediation Services; [5] Transportation and Warehousing; [6] Arts, Entertainment, and Recreation; [7] Real Estate and Rental and Leasing; [8] Professional, Scientific, and Technical Services; [9] Agriculture, Forestry, Fishing and Hunting; [10] Mining, Quarrying, and Oil and Gas Extraction; [11] Management of Companies and Enterprises

Source: EMSI 2020.4Q

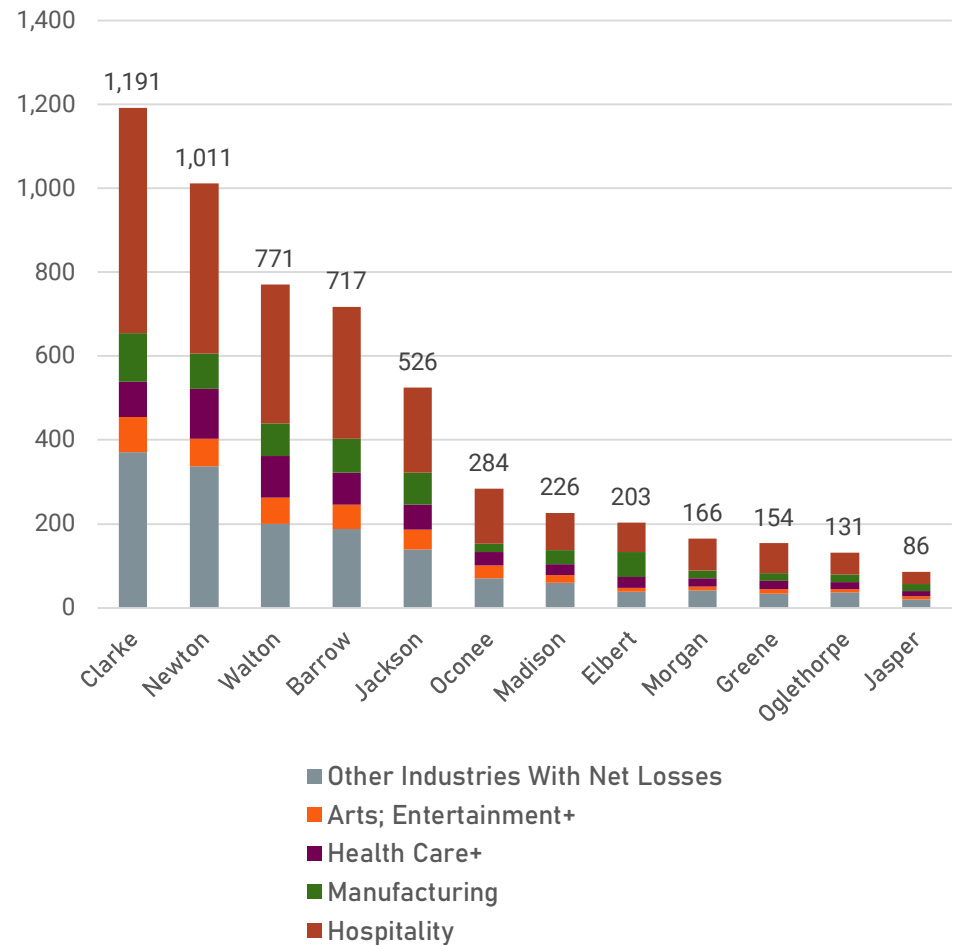
Low-Income Job Loss

Since the start of the pandemic, Northeast Georgia is estimated to have lost a net of approximately 4,000 low-income jobs (i.e., jobs with annual earnings below \$40,000). Most of the net job losses can be attributed to a few key sectors including hospitality, manufacturing, healthcare, and arts/entertainment. As demonstrated in the figures below, Clarke and Newton counties have endured the highest number of low-income job losses. Among industries that have lost jobs since the beginning of the pandemic, both Newton and Clarke have lost over 1,000 jobs each.

Net Low-Income Job Loss
As a Share of Total Low-Income Jobs | By Census Tract



Net Low-Income Job Loss During Pandemic
Among Industries With Net Low-Income Job Losses [1]



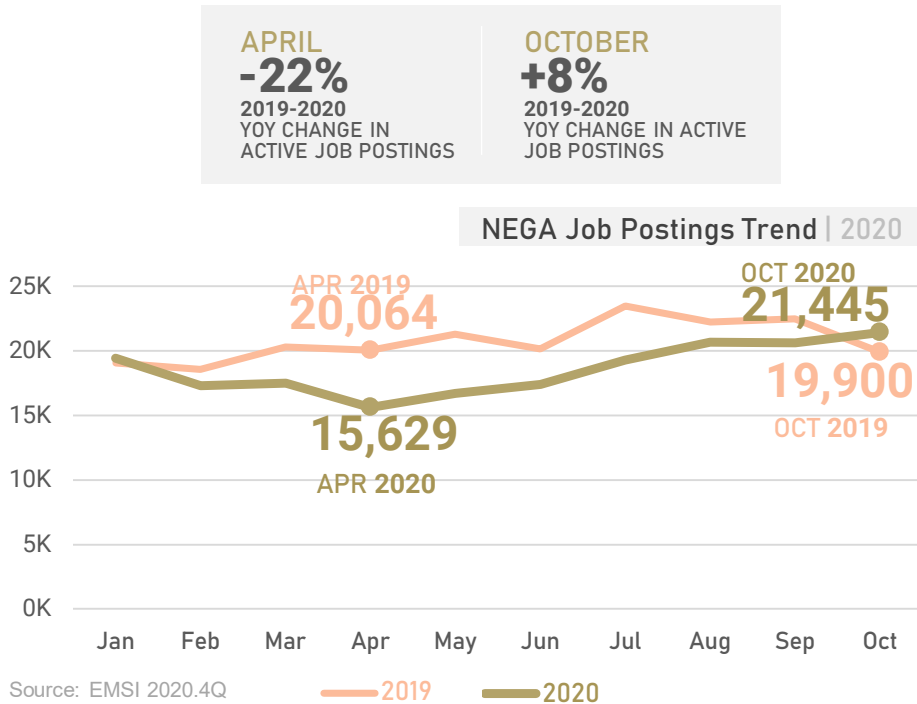
Source: From the Urban Institutes "Estimated Low Income Jobs Lost to COVID-19" dataset (mid-December 2020). <https://datacatalog.urban.org/dataset/estimated-low-income-jobs-lost-covid-19>

[1] Note: Because only industries with net job losses are included, total losses sum to considerably more than the 4,000 total jobs referenced above.

OCCUPATIONAL LANDSCAPE

Active Job Postings

Job postings help paint a picture of what is happening real-time in the region's labor market. After spending most of the year below 2019 job posting levels, the total number of unique (deduplicated) job postings in the Northeast Georgia region in October 2020 exceeded that of October 2019. Job postings have risen steadily since the April 2020 low of 15,629 postings (a year-over-year decrease of 22 percent). Clarke County leads the region with the most job postings since the beginning of the COVID-19 outbreak; from March to October 2020, the county has averaged 6,546 unique job postings. Together, Clarke, Jackson, and Walton Counties account for over 60 percent of unique job postings.

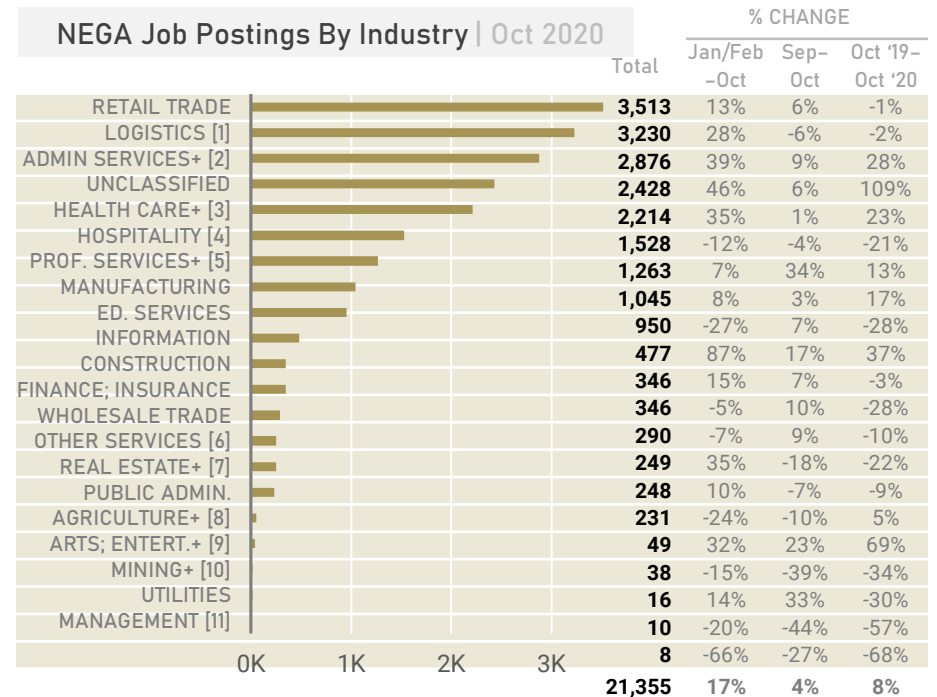


[1] Transportation and Warehousing; [2] Administrative and Support and Waste Management and Remediation Services; [3] Health Care and Social Assistance; [4] Accommodation and Food Services; [5] Professional, Scientific, and Technical Services; [6] Other Services (except Public Administration); [7] Real Estate and Rental and Leasing; [8] Agriculture, Forestry, Fishing and Hunting; [9] Arts, Entertainment, and Recreation; [10] Mining, Quarrying, and Oil and Gas Extraction; [11] Management of Companies and Enterprises

Top Industries by Unique Job Postings

As indicated by the number of job postings in October, some of the region's industries hit the hardest by COVID-19 have experienced an uptick in workforce activity. Retail Trade, Health Care/Social Services, and Accommodation/Food Services were among the top industries for October job postings. Transportation and Warehousing (Logistics), has remained strong throughout the pandemic, posting the second largest number of job postings in October.

Industries with the most growth since pre-COVID levels (as measured by the January/February average) include Information (87 percent), Unclassified (46 percent), Administrative and Support Services (39 percent), Health Care and Social Assistance (35 percent), and Agriculture and Forestry (32 percent). These five industries also saw the most year-over-year growth in postings.



Source: EMSI 2020.4Q
[1-11] See adjacent panel

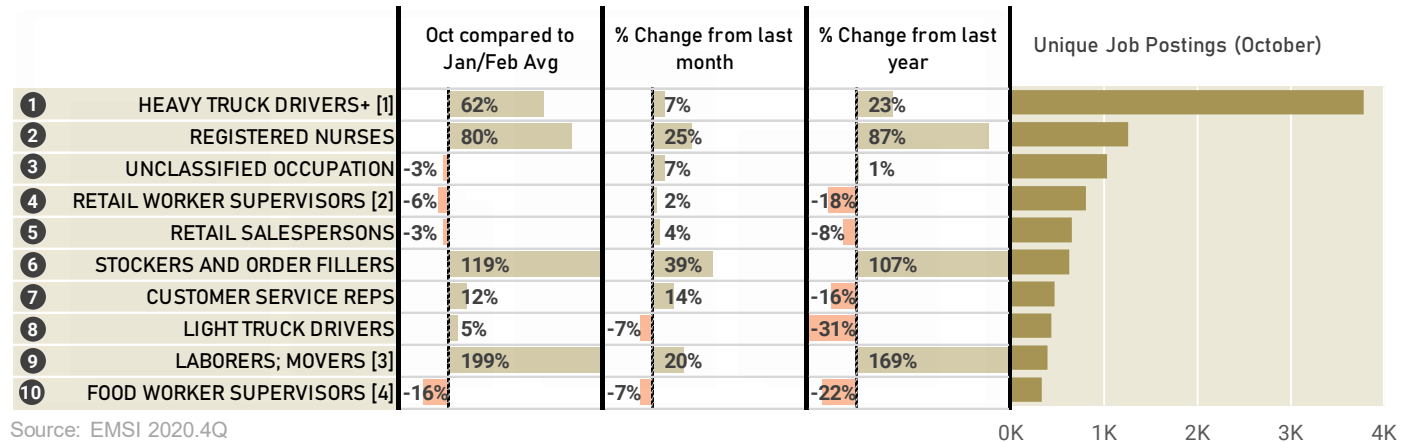
Job Postings by Occupation/Company

Occupations with the most job postings in October align closely with the top industries. The top occupations companies sought to fill in the region in October are truck drivers, nurses, and retail sales workers.

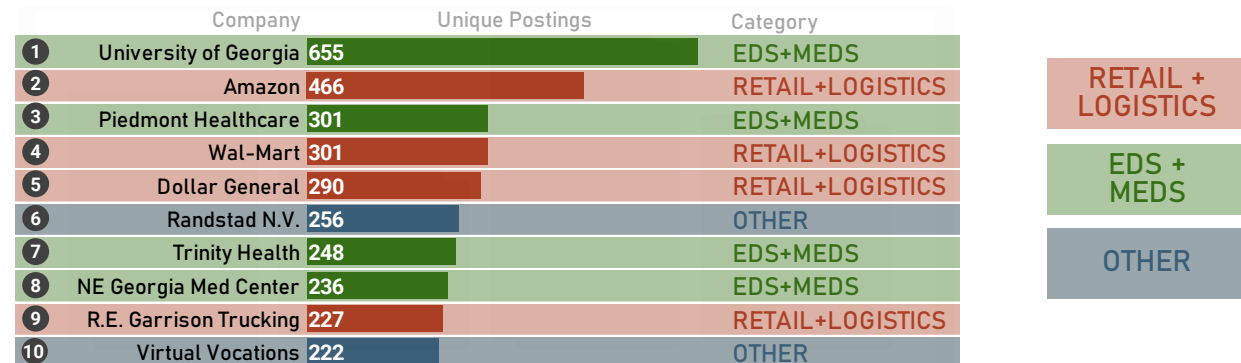
Compared to pre-COVID levels, job postings for Laborers and Freight, Stock, and Material Movers increased by nearly 200 percent and Stockers and Order Fillers postings were up 119 percent. Job postings for these occupations also grew from the previous year. On a monthly basis, Stockers and Registered Nurses saw the largest increase in job postings from September to October.

With 655 unique job postings in October 2020, the University of Georgia topped the list of companies advertising for jobs in the region. The healthcare industry, transportation and warehousing, and retail trade are industry sectors that are well represented in the list of top ten companies hiring in the region.

NEGA Top 10 Occupations by Job Postings | October 2020



NEGA Top 10 Companies by Job Postings | October 2020



[1] Heavy and Tractor-Trailer Truck Drivers; [2] First-Line Supervisors of Retail Sales Workers; [3] Laborers and Freight, Stock, and Material Movers, Hand; [4] First-Line Supervisors of Food Preparation and Serving Workers

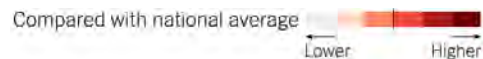
HEALTH

COVID-19 Risk Factors

Certain medical conditions may put a person at an increased risk for severe illness if they become infected with COVID-19. To identify potentially vulnerable populations across the country, PolicyMap created a “Severe COVID-19 Health Risk Index”. It represents the relative risk for a proportion of residents in an area to develop serious health complications from COVID-19 because of underlying health conditions (identified by the CDC as contributing to a person's risk of developing severe symptoms from the virus). The conditions evaluated include the percentage of the population diagnosed with COPD, heart disease, high blood pressure, diabetes, and obesity. Estimates of diabetes and obesity prevalence at the county level are from the CDC's U.S. Diabetes Surveillance System. Estimates of diabetes and obesity at all other geographies, and estimates of COPD, heart disease, and high blood pressure prevalence are from [PolicyMap's Health Outcome Estimates](#). The normalized score represents a sum of the share of the adult population ever diagnosed with each health condition (two or more conditions may be present). Since these values are normalized by adult population, they can be used to compare overall risk between areas with different populations.¹ This data may be useful for identifying reliable COVID-19 testing locations and providing healthcare, communicating public health messaging, and eventually, vaccine distribution.

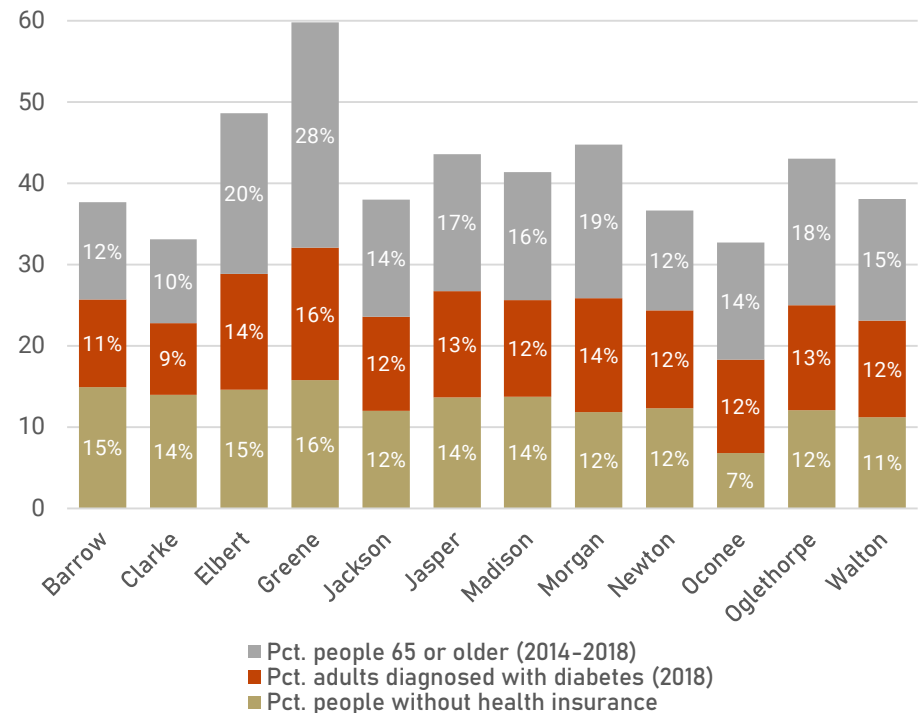
Comorbidity Factors By County | NEGRC²

Health Risk	County	Obesity	Diabetes	High Blood Pressure	Lung Disease	Heart Disease
MED-HIGH	Greene	33	14	42	10	6
	Newton	39	18	34	7	4
	Elbert	40	8	38	9	5
	Morgan	35	14	37	9	5
	Barrow	38	18	30	8	4
	Jasper	38	13	35	8	4
	Madison	34	16	33	8	4
	Oglethorpe	35	12	35	8	5
MED-LOW	Walton	38	11	33	8	4
	Jackson	30	12	32	9	4
LOWER	Oconee	34	6	32	8	4
LOWEST	Clarke	24	7	25	6	3



Notes: The comorbidity factors are compared with the national average, updated as of May 2020. A person may have more than one health condition; numbers are rounded. This index does not include age, race, or income as factors.

Health Risk Factors By County | NEGRC³



¹ Source: PolicyMap Severe COVID-19 Health Risk Index. Data download: <https://www.policymap.com/issues/covid-19/#download-data>







² Source: PolicyMap and New York Times: <https://www.nytimes.com/interactive/2020/05/18/us/coronavirus-underlying-conditions.html?action=click&module=Spotlight&pgtype=Homepage>

³ Source: PolicyMap, accessed November 12, 2020. [http://www.policymap.com/our-data-directory.html#Census:%20Decennial%20Census%20and%20American%20Community%20Survey%20\(ACS\)](http://www.policymap.com/our-data-directory.html#Census:%20Decennial%20Census%20and%20American%20Community%20Survey%20(ACS))

While most counties in the state are currently experiencing epidemic levels of COVID-19 cases, some populations are more at risk than others of suffering negative effects from the pandemic due to factors aside from just individual health issues.

The COVID-19 Community Vulnerability Index (CCVI) layers COVID-19 factors with the CDC’s social vulnerability index (SVI), which measures anticipated negative impact of disasters at the community level. These factors include health-influenced community characteristics, including socioeconomic, household, racial composition, and housing/transportation. For purposes of creating the index, the categories were weighted equally.⁴

COVID-19 Vulnerabilities

Theme	Vulnerability
 Socioeconomic status	Individuals with low income, educational attainment, and no occupation
 Household Composition & Disability	Households with elderly (over 65), young (under 17), or disabled members, or single-parent homes
 Minority Status & Language	Racially marginalized groups or those with limited English proficiency
 Housing Type & Transportation	Dwellings with multiple units, mobile, group, or crowded living arrangements, and households without access to transport
 Epidemiologic Factors	High-risk COVID-19 populations with underlying conditions (cardiovascular, respiratory, immunocompromised, obesity, diabetes), high flu and pneumonia mortality, or high population density
 Healthcare System Factors	Poor health system capacity, strength and preparedness

⁴ The COVID-19 Community Vulnerability Index (CCVI). Surgo Foundation: <https://precisionforcovid.org/ccvi>

In addition to the CCVI ranking, Chmura Economics developed an economic vulnerability index, which measures the negative impact that the coronavirus has had on employment based on an area’s industry mix.⁴ Areas with high employment in food/accommodation services, which were severely impacted in terms of job loss during the crisis, are considered more “vulnerable” in the model, and will therefore show a higher score (above the US average of 100). When viewed together, the index provides a baseline for regions to target resources in the communities where it’s needed most.

CCVI & Chmura Economics Vulnerability Rankings

County	CCVI Score	CCVI Vulnerability Rank	Chmura Economic Vulnerability Score	Economic Vulnerability Rank
U.S. AVERAGE	0.5	Moderate	100	Moderate
GEORGIA	0.86	Very High	85	Moderate-Low
Elbert	0.93	VERY HIGH	84	Moderate-Low
Jasper	0.85		78	Moderate-Low
Newton	0.85		93	Moderate
Oglethorpe	0.79	HIGH	56	Low
Madison	0.76		58	Low
Jackson	0.71		92	Moderate
Morgan	0.71		120	Moderate-High
Walton	0.6	MODERATE	91	Moderate
Barrow	0.52		100	Moderate
Greene	0.46		115	Moderate-High
Clarke	0.25	LOW	108	Moderate
Oconee	0.17	VERY LOW	101	Moderate

⁵ Chmura Economics COVID-19 Economic Vulnerability Index. Updated April 15, 2020. <http://www.chmuraecon.com/interactive/covid-19-economic-vulnerability-index/>

Healthcare Capacity

The ability of hospitals and healthcare facilities to provide adequate care and capacity for COVID patients varies across the state. In terms of healthcare capacity, most of the region's 1,055 hospital beds are in two facilities: Piedmont Athens Regional and St. Mary's Hospital (Clarke). Only seven facilities have full-time physicians, with St. Mary's Hospital (Clarke) having 20 of the 36 full-time physicians in the Northeast Georgia region.



NEGA Hospitals

	Facility Name	Facility Type	Medically Underserved Areas*	Rural Status	Beds	TOTAL FTE
1	Piedmont Athens Regional Med. Center	SHORT TERM	Not an MUA or MUP		315	1,041
2	St Mary's Hospital	SHORT TERM	Medically Underserved Area		196	681
3	Northridge Medical Center	SHORT TERM	Not an MUA or MUP	Rural Hospital	90	148
4	Piedmont Newton Hospital	SHORT TERM	Medically Underserved Area		90	214
5	Piedmont Walton Hospital, Inc	SHORT TERM	Medically Underserved Area	Rural Hospital	77	190
6	Ridgeview Institute Monroe	PSYCHIATRIC	Medically Underserved Area	Rural Hospital	70	60
7	NE Georgia Medical Center Barrow	SHORT TERM	Not an MUA or MUP		56	58
8	Elbert Memorial Hospital	SHORT TERM	Medically Underserved Area	Rural Hospital	52	126
9	Landmark Hospital Of Athens	LONG TERM	Not an MUA or MUP		42	2
10	Morgan Medical Center	CRITICAL ACCESS	Medically Underserved Area		25	83
11	St Mary'S Good Samaritan Hospital	CRITICAL ACCESS	Medically Underserved Area	Rural Hospital	25	85
12	Jasper Memorial Hospital	CRITICAL ACCESS	Medically Underserved Area		17	30

*MUA, 2019



Source: PolicyMap Severe COVID-19 Health Risk Index. Data download: <https://www.policymap.com/issues/covid-19/#download-data>

HOUSING

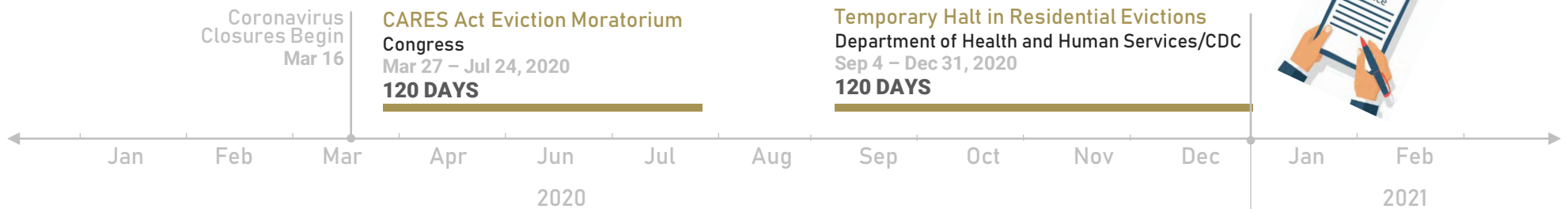
Residential Evictions

Residential eviction data is typically located within individual county probate court systems. Federal and state agencies do not formally collect, report, or track housing evictions, making it difficult to analyze displacement trends related to the pandemic.

In response to business closures and high unemployment rates earlier this year, Congress passed the Coronavirus Aid, Relief, and Economic Security (CARES) Act to assist individuals and businesses impacted by COVID-19. Signed into law March 27, 2020, a portion of the CARES Act provided a 120-day moratorium on all eviction filings in rental properties with Federal assistance or federally related financing. While these protections helped alleviate the public health consequences of tenant displacement during the COVID-19 pandemic, the provision only applied to renters occupying certain qualifying properties. The CARES Act eviction moratorium expired on July 24, 2020.

To extend protection for tenants, the Department of Health and Human Services, through the Center for Disease Control, enacted the agency order "Temporary Halt in Residential Evictions to Prevent the Further Spread of COVID-19," effective from September 4, 2020 through December 31, 2020. This order, under the Public Health Services Act, provides for a temporary halt to most residential evictions due to financial hardship through the end of this year.

The eviction protections of the CARES Act, the subsequent CDC agency order, and rent freezes implemented by some state governors and local officials under emergency powers has helped to alleviate concerns for residential renters with financial hardships.



Mortgage Foreclosures

Due to these interventions, mass evictions have so far been avoided. However, if future provisions are not made for evictions in 2021, many tenants who have benefitted from the moratorium could be responsible, in full, for any missed payments.

In addition to providing rental eviction relief, the CARES Act also provided protection for homeowners by allowing the right to request mortgage forbearance for up to 180 days. A forbearance plan provides for the temporary suspension or reduction of mortgage payments for a specific period during a temporary hardship such as unemployment. The moratorium on residential foreclosures and evictions for those with residential loans insured or guaranteed by FHA, VA, USDA or loans that are owned or securitized by Fannie Mae or Freddie Mac has been extended through December 31, 2020. An examination of available foreclosure data has shown a decrease in foreclosures for 2020 due to the CARES Act provisions and banks working with homeowners to modify existing payment schedules.



Homeowner Protections

CARES ACT
Congress
Mar 27

RIGHT TO REQUEST MORTGAGE FORBEARANCE

FOR UP TO 180 DAYS

Renter Eviction Moratoriums

Temporary Halt in Residential Evictions
Department of Health and Human Services/CDC
Sep 4 – Dec 31, 2020
120 DAYS



RACE/ETHNICITY

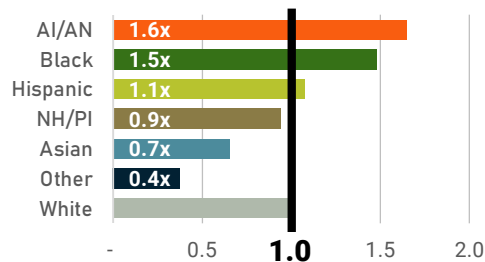
Overview

Racial disparities among COVID-19 cases, hospitalizations, and deaths have been widely reported nationally. Similar disparities were observed in Northeast Georgia, although specifics varied. This section of the report highlights COVID-19's impacts across racial and ethnic groups based on available data through early December 2020. Consistent with multiple CDC analyses, case and death rates are presented relative to white non-Hispanic death rates. According to one CDC report, this “avoid[s] comparing rates among...[any particular racial/ethnic group]...to other marginalized populations that experience similar health disparities.”⁶

The cumulative observed case rate and death rates across Northeast Georgia were approximately 475 per 10,000 and 8 per 10,000, respectively. These rates, however, varied significantly across racial/ethnic groups. Among the largest racial/ethnic minorities in Northeast Georgia, Hispanic and Black residents have been impacted particularly hard by COVID-19. Among smaller racial/ethnic minorities, non-Hispanic American Indians/Native Alaskans (AI/ANs) and non-Hispanic Native Hawaiians and Pacific Islanders (NH/PIs) have shouldered a disproportionate amount of the impact. The figure below details the impacts on various racial and ethnic groups, including case and death rate comparisons. Although unavailable for Northeast Georgia, age-adjusted rates at the national level demonstrate that many racial/ethnic minority groups are considerably younger than the white population, and all else equal, would be expected to have considerably lower death rates.)⁷ In Northeast Georgia, for example, the average age among Hispanics in Northeast Georgia is approximately 25 years compared with 36 years across the entire population.⁸



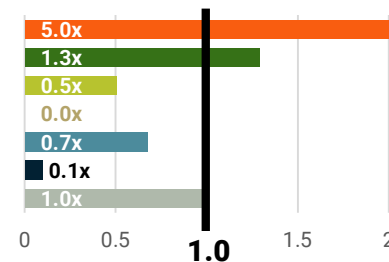
US Deaths (Unadjusted)
Compared to White Non-Hispanic



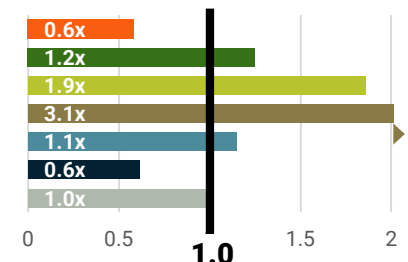
	Deaths (Unadjusted)	Deaths (Age-Adjusted)
American Indian/Alaska Native (AI/AN)	1.6x	2.6x
Black	1.5x	2.8x
Hispanic	1.1x	2.8x
Native Hawaiian/Pacific Islander (NH/PI)	0.9x	NA
Asian	0.7x	1.1x
Other	0.4x	NA
White	1.0x	1.0x



NEGA Deaths (Unadjusted)
Compared to White Non-Hispanic



NEGA Cases (Unadjusted)
Compared to White Non-Hispanic



	Deaths (Unadjusted)	Hospitalizations (Unadjusted)	Cases (Unadjusted)
American Indian/Alaska Native (AI/AN)	5.0x	1.0x	0.6x
Black	1.3x	2.0x	1.2x
Hispanic	0.5x	1.5x	1.9x
Native Hawaiian/Pacific Islander (NH/PI)	0.0x	4.9x	3.1x
Asian	0.7x	0.7x	1.1x
Other	0.1x	1.1x	0.6x
White	1.0x	1.0x	1.0x

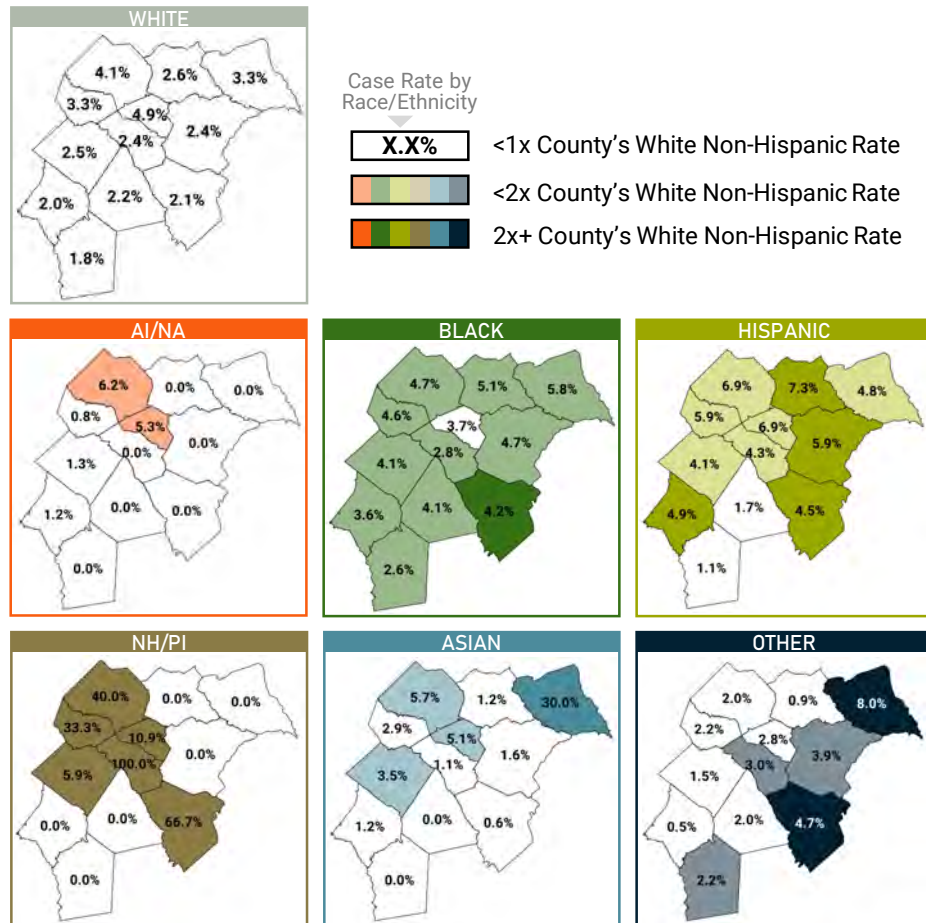
Note: Hispanic includes Hispanic persons of any race; all other categories exclude Hispanic persons. Sources: Unadjusted US Data from CDC's "Provisional Death Counts for Coronavirus Disease (COVID-19): Distribution of Deaths by Race and Hispanic Origin": <https://data.cdc.gov/w/pj7m-y5uh/tdwk-ruh?cur=u2C8tRv6Yn> (early December 2020); Age-Adjusted US Data from CDC's "COVID-19 Hospitalization and Death by Race/Ethnicity (updated November 30, 2020)": <https://www.cdc.gov/coronavirus/2019-ncov/covid-data/investigations-discovery/hospitalization-death-by-race-ethnicity.html>; NEGA Data: Georgia Department of Public Health Daily Status Report (early December 2020) <https://dph.georgia.gov/covid-19-daily-status-report>

⁶ From COVID-10 Among American Indian and Alaska Native Persons – 23 States, January 31-July 3, 2020; <https://www.cdc.gov/mmwr/volumes/69/wr/pdfs/mm6934e1-H.pdf>

⁷ See discussion of age-adjusted rates from APM Research Lab's "The Color of Coronavirus": <https://www.apmresearchlab.org/covid/deaths-by-race> ⁸ Esri 2020 Estimates via Community Analyst

The impact of COVID-19 on racial/ethnic groups varied by county across the region. The figure below shows case rates by county. Counties in which racial/ethnic minority case rates exceed case rates for non-Hispanic whites are highlighted. While case rates more effectively demonstrate the disproportionate impact of COVID on certain racial/ethnic minorities in Northeast Georgia (namely Hispanics and Blacks), they mask higher death rates among American Indians/Native Alaskans (despite a comparable case rate to white non-Hispanics).

Case Rates By Race/Ethnicity & County



The CDC identifies several “inequities in social determinants of health” that generally leave racial minorities more vulnerable to COVID-19. These inequities directly impact susceptibility to contracting COVID-19 but also contribute to other underlying health conditions that “increase one’s risk of severe illness from COVID-19”.

Key COVID-19 Risk Factors Among Racial/Ethnic Minority Groups

Adapted from the CDC’s “Health Equity Considerations and Racial and Ethnic Minority Groups”⁷

Discrimination – Systemic discrimination in health care, housing, education, criminal justice, and finance. Can lead to chronic and toxic stress and shapes social and economic factors that put some people from racial and ethnic minority groups at increased risk for COVID-19.

Healthcare Access & Utilization: Various minority groups struggle with access to adequate care due to lack of insurance, lack of transportation, lack of childcare, inability to take time off work, communication/cultural barriers, and or current/historical discrimination in the healthcare system. This discrimination also contributes to distrust among some individuals.

Occupation: People from some racial and ethnic minority groups are disproportionately represented in essential work settings such as healthcare facilities, farms, factories, grocery stores, and public transportation.

Educational, income, and wealth gaps: Inequities in access to high-quality education for some racial and ethnic minority groups can lead to lower high school completion rates and barriers to college entrance. This may lead to lower paying or less stable jobs, and limited opportunities to secure lower risk work during the pandemic.

Housing: Larger households and denser living arrangements among some people from racial and ethnic minority groups can make it more challenging to follow prevention strategies. Growing and disproportionate unemployment rates for some groups may also lead to greater risk of eviction and homelessness.

The same CDC report also notes that racial/ethnic minorities often bear a disproportionate share of the burden from mitigation measures intended to curb the spread of COVID-19. Minorities are heavily represented in industries impacted by shutdowns like hospitality and retail. In addition to this economic impact, some may be less well-positioned to shoulder the stress and “reduced access to services” resulting from shutdowns. A final note regarding the limitations of the data is warranted. Despite significant improvements in the amount of available data, the race and/or ethnicity of the person is unknown in 8% of hospitalizations and 40% of cases, based on the previously-referenced Georgia Department of Public Health data.

⁷ Quoted directly or adapted from the CDC’s “Health Equity Considerations and Racial and Ethnic Minority Groups”: <https://www.cdc.gov/coronavirus/2019-ncov/community/health-equity/race-ethnicity.html>. See this resource for additional references and sources.

5. COUNTY PROFILES

BARROW COUNTY

83,240¹
POPULATION

Demographics

AGE² **19%** **MEDIAN AGE 36.1**

55+ <55 <35 <15

RACE³ **28% POC** **RACIAL MAKEUP**

	Cases	Hospitalizations	Deaths
American Indian / Native Alaskan	0.2x	2.1x	10.1x
Black	1.4x	1.9x	1.0x
Hispanic (Any race)	1.8x	0.9x	1.5x
Native Hawaiian / Pacific Islander	10.2x	0.0x	0.0x
Asian	0.9x	0.4x	0.5x
Other	0.7x	0.0x	0.7x
White	1.0x	1.0x	1.0x

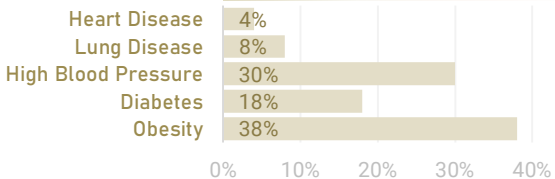
COVID RATES COMPARED TO WHITE NON-HISPANIC⁴
(Maximums Highlighted)

INCOME⁵ **39% <50K** **MEDIAN INCOME \$75K** **SNAP HHs⁶ 13%**

<\$25K <\$50K <\$100K \$100K+

Health

Population Share⁷



UNINSURED POPULATION⁸ 15%

HOSPITAL BEDS⁹ 56

ICU BEDS¹⁰ 6

Sales Tax¹¹

2019-2020
+10.6%

CHANGE IN TAXABLE RETAIL ACTIVITY

2020
\$121

SALES TAX/ CAPITA



Coronavirus Impact Survey

CITY GOVERNMENT **7**

COUNTY GOVERNMENT **2**

CHAMBER OF COMMERCE **2**

11 RESPONDENTS

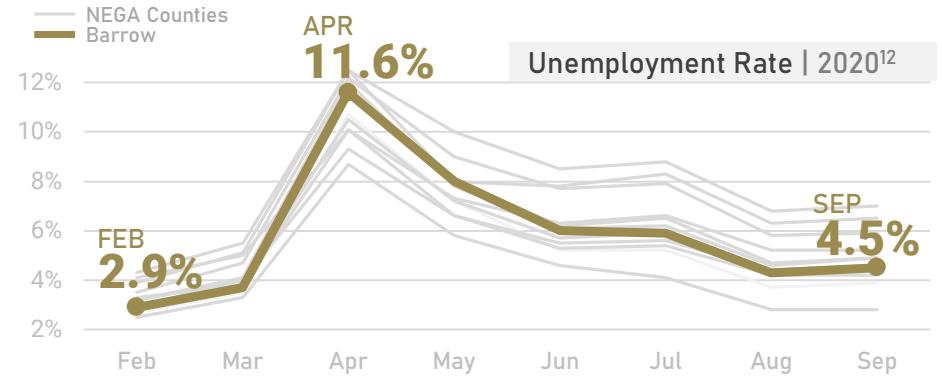
55% REPORTED ADDING PUBLIC INTERNET HOTSPOTS

64% REPORTED TEMPORARY OR PERMANENT LAYOFFS AT BUSINESSES

82% REPORTED REDUCED OR CHANGED INDUSTRIAL PRODUCTION



Employment



Top 5 Occupations by Unique Job Postings | October 2020¹³

328	Heavy Truck Drivers+ [1]	1
88	Supervisors Of Retail Workers [2]	2
88	Registered Nurses	3
79	Retail Salespersons	4
76	Stockers And Order Fillers	5

Top 5 Companies by Job Postings | October 2020¹⁴

79	Amazon	1
68	NE Georgia Medical Center	2
47	Randstad N.V.	3
46	Carvana	4
33	Dollar General	5

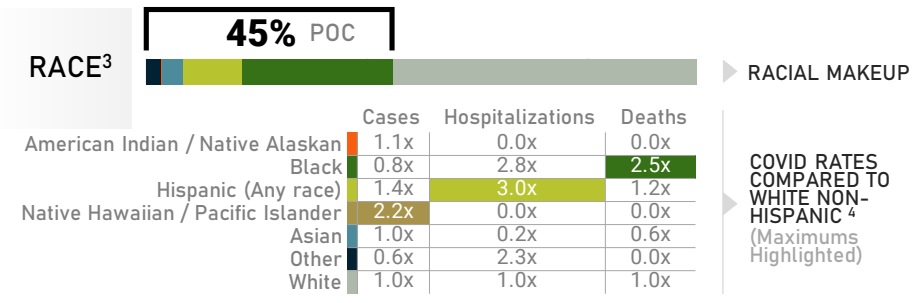
¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers

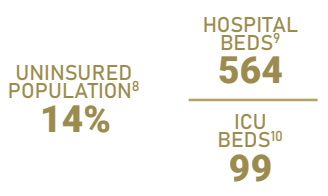
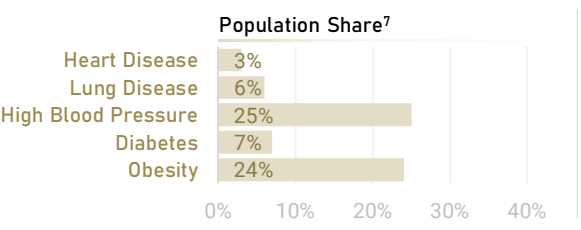
CLARKE COUNTY

128,331¹
POPULATION

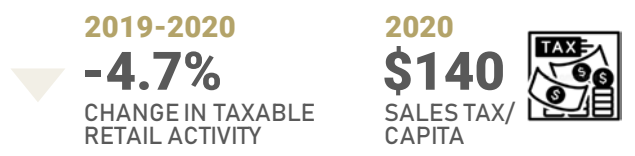
Demographics



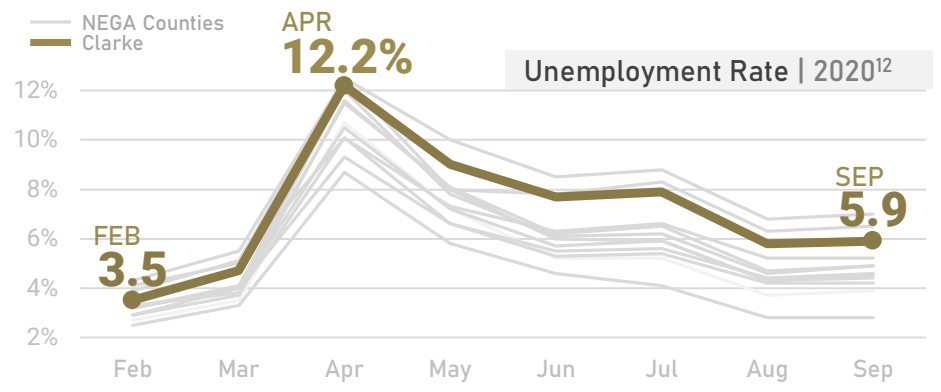
Health



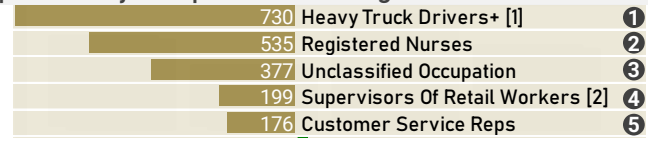
Sales Tax¹¹



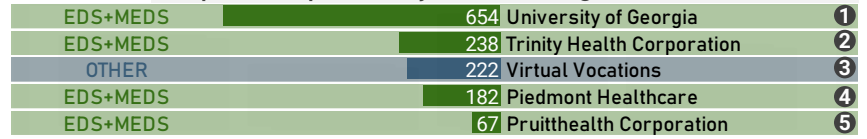
Employment



Top 5 Occupations by Unique Job Postings | October 2020¹³



Top 5 Companies by Job Postings | October 2020¹⁴



Coronavirus Impact Survey



¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals; ⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers; [3] Or patients being transferred out of the community

ELBERT COUNTY

19,194¹
POPULATION



Employment

Demographics

AGE²

30%

55+

<55

<35

<15

MEDIAN AGE

42.8

RACE³

37% POC

RACIAL MAKEUP

	Cases	Hospitalizations	Deaths
American Indian / Native Alaskan	0.0x	0.0x	0.0x
Black	1.7x	1.8x	1.8x
Hispanic (Any race)	1.4x	0.6x	0.0x
Native Hawaiian / Pacific Islander	0.0x	0.0x	0.0x
Asian	9.0x	15.2x	0.0x
Other	2.4x	12.2x	0.0x
White	1.0x	1.0x	1.0x

COVID RATES COMPARED TO WHITE NON-HISPANIC⁴
(Maximums Highlighted)

INCOME⁵

56% <50K

<\$25K

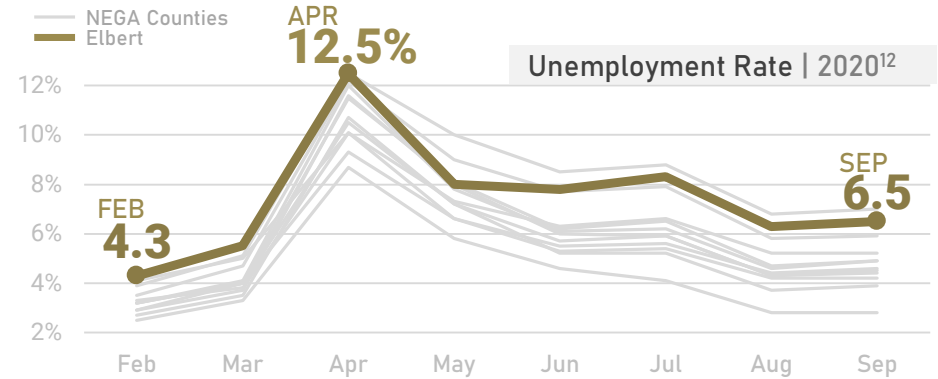
<\$50K

<\$100K

\$100K+

MEDIAN INCOME
\$42K

SNAP HHs⁶
19%



Top 5 Occupations by Unique Job Postings | October 2020¹³

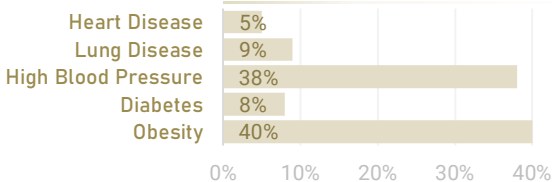
131	Heavy Truck Drivers+ [1]	1
39	Supervisors Of Retail Workers [2]	2
29	Unclassified Occupation	3
22	Home Health/Personal Care Aides	4
18	Light Truck Drivers	5
18	Practical And Vocational Nurses [3]	5

Top 5 Companies by Job Postings | October 2020¹⁴

RETAIL+LOGISTICS	29	Wal-Mart, Inc.	1
RETAIL+LOGISTICS	24	Dollar General Corporation	2
EDS+MEDS	21	Pruithhealth Corporation	3
RETAIL+LOGISTICS	19	U.S. Xpress, Inc.	4
OTHER	17	Home Instead Senior Care	5

Health

Population Share⁷



UNINSURED POPULATION⁸
15%

HOSPITAL BEDS⁹
52

ICU BEDS¹⁰
4

Coronavirus Impact Survey

CITY GOVERNMENT 2
COUNTY GOVERNMENT 1
CHAMBER OF COMMERCE 1
DEVELOPMENT AUTHORITY 1

5
RESPONDENTS

Sales Tax¹¹

2019-2020

+5.1%

CHANGE IN TAXABLE RETAIL ACTIVITY

2020

\$88

SALES TAX/ CAPITA



50%
REPORTED AN INCREASE IN INTERNET HOTSPOTS TO PROVIDE BETTER INTERNET

60%
REPORTED TEMPORARY OR PERMANENT LAYOFFS

60%
REPORTED CHANGES TO THE MANUFACTURING AND RETAIL SECTORS

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers [3] Licensed Practical and Licensed Vocational Nurses

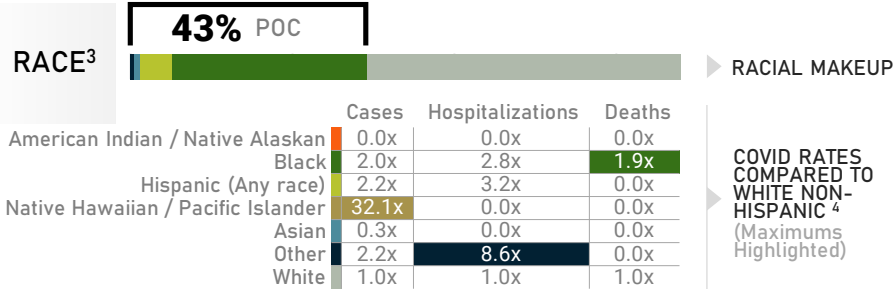
GREENE COUNTY

18,324¹
POPULATION

Demographics

AGE² **38%** **MEDIAN AGE 50.6**

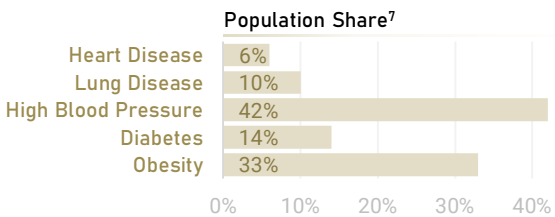
55+ <55 <35 <15



INCOME⁵ **43% <50K** **MEDIAN INCOME \$59K** **SNAP HHs⁶ 14%**

<\$25K <\$50K <\$100K \$100K+

Health



UNINSURED POPULATION⁸ 16%

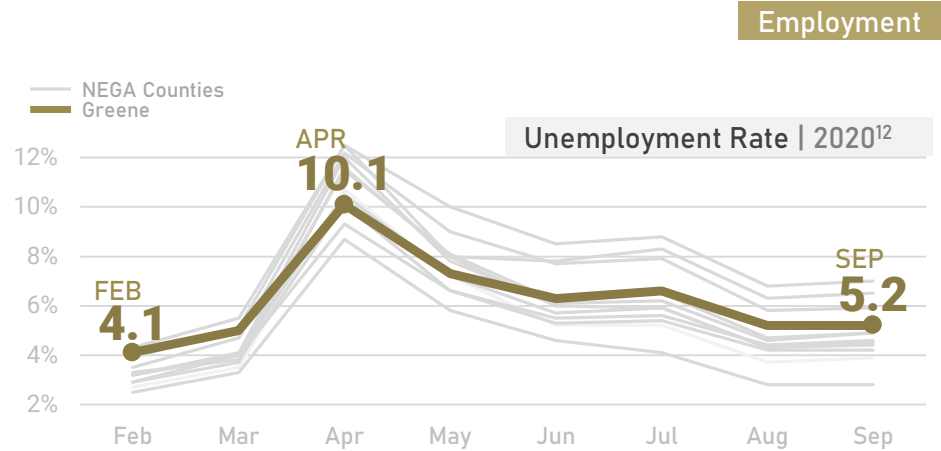
HOSPITAL BEDS⁹ 50

ICU BEDS¹⁰ 8

Sales Tax¹¹

2019-2020
-2.7%
CHANGE IN TAXABLE
RETAIL ACTIVITY

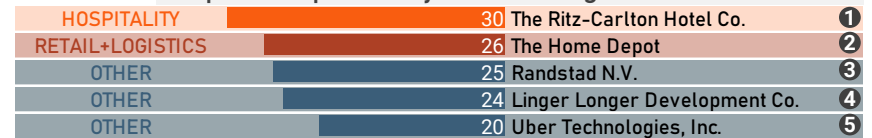
2020
\$214
SALES TAX/
CAPITA

Top 5 Occupations by Unique Job Postings | October 2020¹³



Top 5 Companies by Job Postings | October 2020¹⁴



Coronavirus Impact Survey

4 RESPONDENTS

CITY GOVERNMENT 2
COUNTY GOVERNMENT 1
CHAMBER OF COMMERCE 1

50%
REPORTED
BUSINESSES BEING
IMPACTED "VERY
NEGATIVELY"

75%
REPORTED
"FAMILY AND
CHILDCARE" AS
CHALLENGES
FOR BUSINESSES

100%
REPORTED
AREAS IN THE
COUNTY THAT LACK
RELIABLE INTERNET

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York

Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor

Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers

JACKSON COUNTY

72,977¹
POPULATION

Demographics

AGE²

23%

55+

<55

<35

<15

MEDIAN AGE

38.5

RACE³

18%

RACIAL MAKEUP

	Cases	Hospitalizations	Deaths
American Indian / Native Alaskan	1.5x	3.2x	15.5x
Black	1.1x	0.8x	1.5x
Hispanic (Any race)	1.7x	1.4x	0.8x
Native Hawaiian / Pacific Islander	9.7x	0.0x	0.0x
Asian	1.4x	2.2x	4.8x
Other	0.5x	1.0x	0.0x
White	1.0x	1.0x	1.0x

COVID RATES
COMPARED TO
WHITE NON-
HISPANIC⁴
(Maximums
Highlighted)

INCOME⁵

29% <50K

<\$25K <\$50K

<\$100K

\$100K+

MEDIAN INCOME

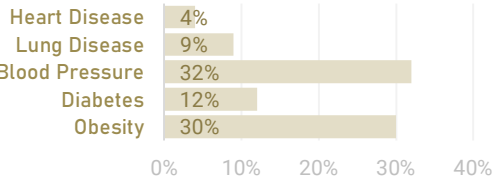
\$72K

SNAP HHs⁶

11%

Health

Population Share⁷



UNINSURED POPULATION⁸
12%

HOSPITAL BEDS⁹
28

ICU BEDS¹⁰
5

Sales Tax¹¹

2019-2020

+11.7%

CHANGE IN TAXABLE
RETAIL ACTIVITY

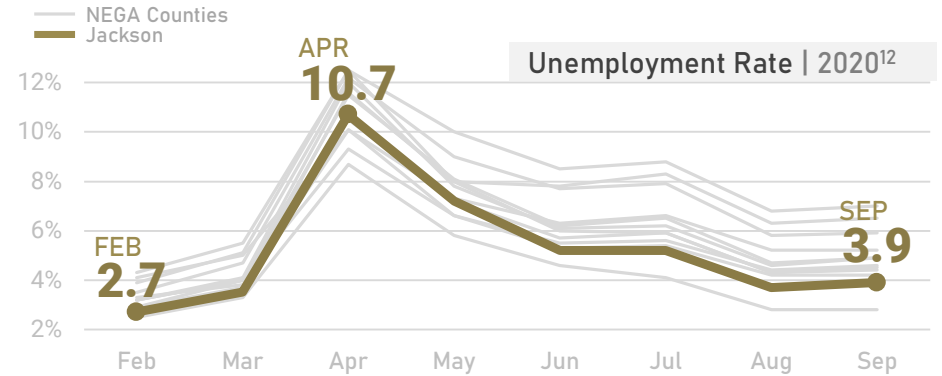
2020

\$149

SALES TAX/
CAPITA



Employment



Top 5 Occupations by Unique Job Postings | October 2020¹³

575	Heavy Truck Drivers+ [1]	1
217	Unclassified Occupation	2
197	Stockers And Order Fillers	3
193	Registered Nurses	4
149	Laborers; Movers [2]	5

Top 5 Companies by Job Postings | October 2020¹⁴

EDS+MEDS	169	Northeast Georgia Med Center	1
RETAIL+LOGISTICS	135	Amazon	2
RETAIL+LOGISTICS	56	Wal-Mart, Inc.	3
OTHER	55	Randstad N.V.	4
RETAIL+LOGISTICS	46	Dollar General	5

Coronavirus Impact Survey

CITY GOVERNMENT 8
COUNTY GOVERNMENT 2
CHAMBER OF COMMERCE 2
DEVELOPMENT AUTHORITY 2
EDUCATION 3

17
RESPONDENTS

53%
REPORTED
BUSINESSES HAVE
BEEN IMPACTED
"SOMEWHAT
NEGATIVELY"

71%
REPORTED
A REDUCTION IN
BUSINESS
SPENDING

82%
REPORTED
AREAS IN
THE COUNTY THAT
LACK RELIABLE
INTERNET

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York

Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor

Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] Laborers & Freight, Stock, & Material Movers, Hand

JASPER COUNTY

14,219¹
POPULATION

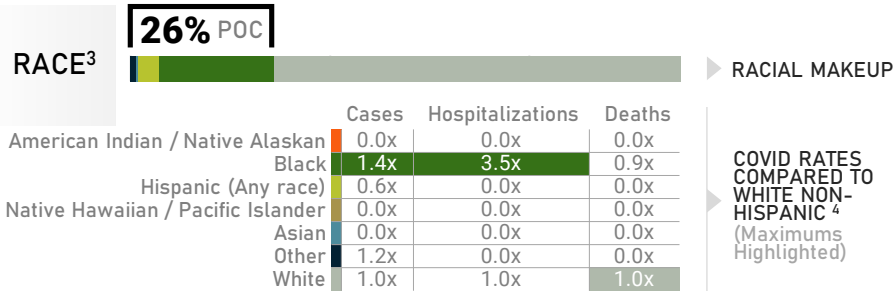


Employment

Demographics

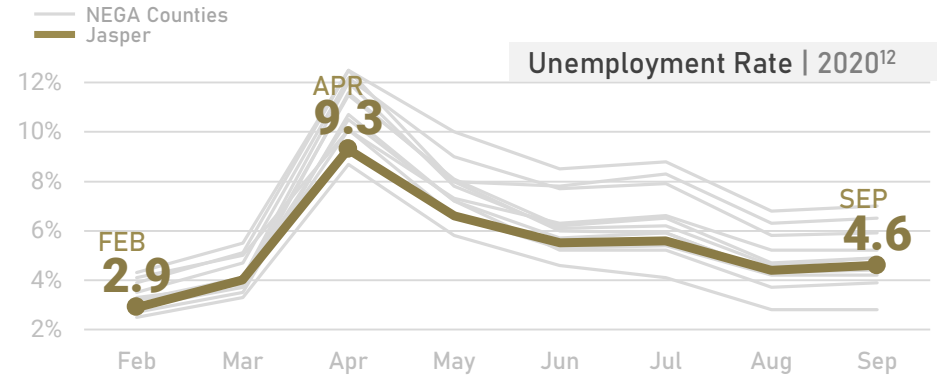
AGE² **27%** **MEDIAN AGE 40.6**

55+ <55 <35 <15



INCOME⁵ **58% <50K** **MEDIAN INCOME \$43K** **SNAP HHs⁶ 20%**

<\$25K <\$50K <\$100K \$100K+



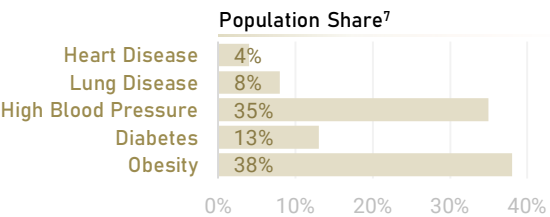
Top 5 Occupations by Unique Job Postings | October 2020¹³

153	Heavy Truck Drivers+ [1]	1
17	Speech-Language Pathologists	2
17	Supervisors Of Retail Workers [2]	2
10	Customer Service Reps	4
9	Passenger Vehicle Drivers [3]	5

Top 5 Companies by Job Postings | October 2020¹⁴

RETAIL+LOGISTICS	15	Dollar General	1
RETAIL+LOGISTICS	14	R.E. Garrison Trucking, Inc.	2
OTHER	14	Soliant Health, Inc	2
RETAIL+LOGISTICS	13	U.S. Xpress, Inc.	4
RETAIL+LOGISTICS	13	C.R. England, Inc.	4

Health



HOSPITAL BEDS⁹ 12

UNINSURED POPULATION⁸ 14%

ICU BEDS¹⁰ 2

Coronavirus Impact Survey

6 RESPONDENTS

CITY GOVERNMENT **3**

COUNTY GOVERNMENT **2**

DEVELOPMENT AUTHORITY **1**

Sales Tax¹¹

2019-2020
+10.3%
CHANGE IN TAXABLE
RETAIL ACTIVITY

2020
\$62
SALES TAX/
CAPITA

67%
REPORTED
HOSPITALS
REACHING
CAPACITY DUE
TO COVID-19 [3]

83%
REPORTED
TEMPORARY OR
PERMANENT
BUSINESS
CLOSURES

100%
REPORTED
AREAS IN
THE COUNTY THAT
LACK RELIABLE
INTERNET

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals; ⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers [3] Except Bus Drivers, Transit and Intercity

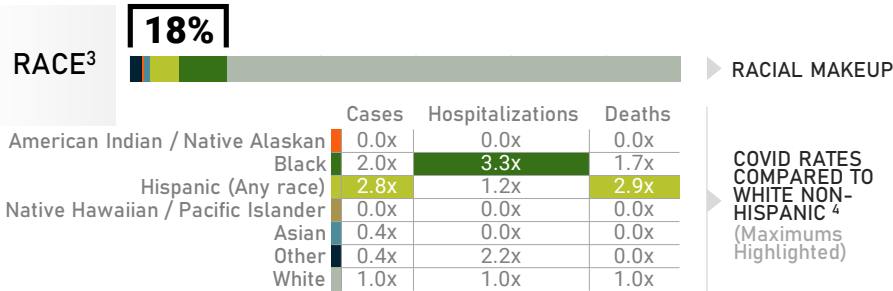
MADISON COUNTY

29,880¹
POPULATION

Demographics

AGE² **27%** **MEDIAN AGE 41.4**

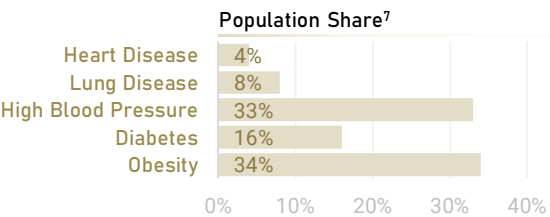
55+ <55 <35 <15



INCOME⁵ **44% <50K** **MEDIAN INCOME \$55K** **SNAP HHs⁶ 13%**

<\$25K <\$50K <\$100K \$100K+

Health



UNINSURED POPULATION⁸ 14%

HOSPITAL BEDS⁹ 0

ICU BEDS¹⁰ 0

Sales Tax¹¹

2019-2020
+10.1%
CHANGE IN TAXABLE
RETAIL ACTIVITY

2020
\$64
SALES TAX/
CAPITA

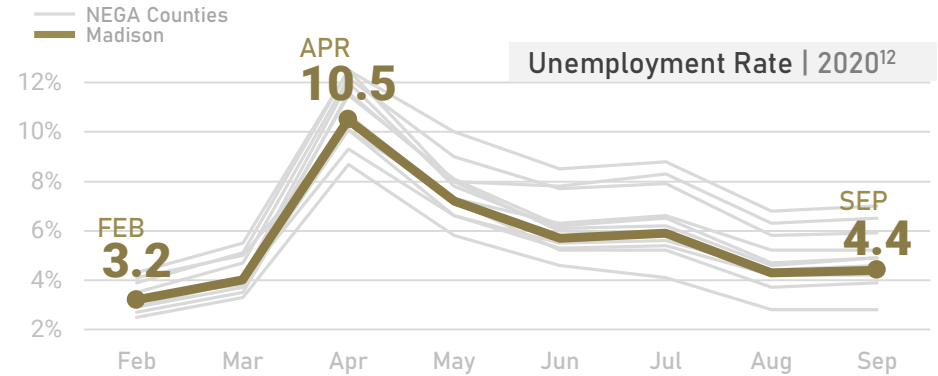


50%
REPORTED
BUSINESS
PROJECTS
STILL REMAIN
ON HOLD

67%
REPORTED
A SIGNIFICANT
REDUCTION
IN WORKFORCE

58%
REPORTED
IDENTIFYING AREAS
UNDERSERVED BY
HIGH-SPEED
INTERNET

Employment



Top 5 Occupations by Unique Job Postings | October 2020¹³

294	Heavy Truck Drivers+ [1]	1
51	Stockers And Order Fillers	2
26	Laborers; Movers [2]	3
24	Unclassified Occupation	4
24	Supervisors Of Retail Workers [3]	4

Top 5 Companies by Job Postings | October 2020¹⁴

RETAIL+LOGISTICS	88	Amazon	1
RETAIL+LOGISTICS	30	R.E. Garrison Trucking, Inc.	2
OTHER	26	Uber Technologies, Inc.	3
RETAIL+LOGISTICS	23	Dollar General	4
RETAIL+LOGISTICS	20	U.S. Xpress, Inc.	5

Coronavirus Impact Survey

CITY GOVERNMENT 6
COUNTY GOVERNMENT 1
CHAMBER OF COMMERCE 4
DEVELOPMENT AUTHORITY 1

12
RESPONDENTS

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

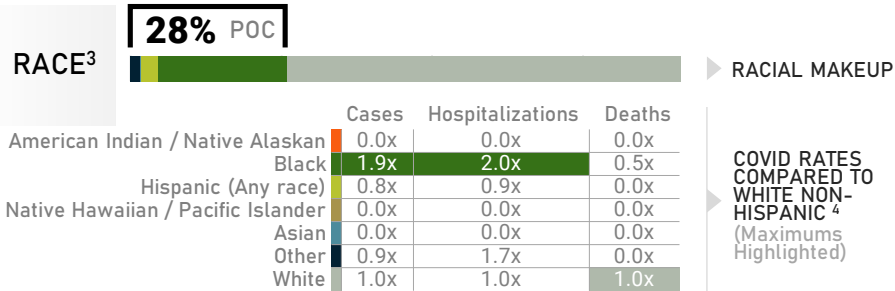
⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] Laborers & Freight, Stock, & Material Movers, Hand [3] First-Line Supervisors of Retail Sales Workers

MORGAN COUNTY

19,276¹
POPULATION

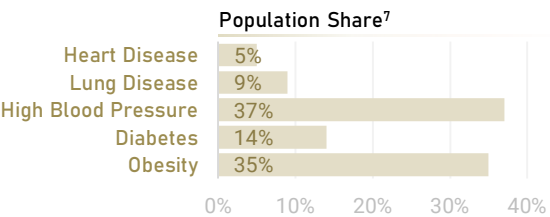
Demographics

AGE² **29%**
55+ <55 <35 <15
MEDIAN AGE **43.5**



INCOME⁵ **46% <50K**
<\$25K <\$50K <\$100K \$100K+
MEDIAN INCOME **\$54K** **SNAP HHs⁶** **13%**

Health



UNINSURED POPULATION⁸ **12%**
HOSPITAL BEDS⁹ **25**
ICU BEDS¹⁰ **4**

Sales Tax¹¹

2019-2020
-0.4%
CHANGE IN TAXABLE
RETAIL ACTIVITY

2020
\$165
SALES TAX/
CAPITA



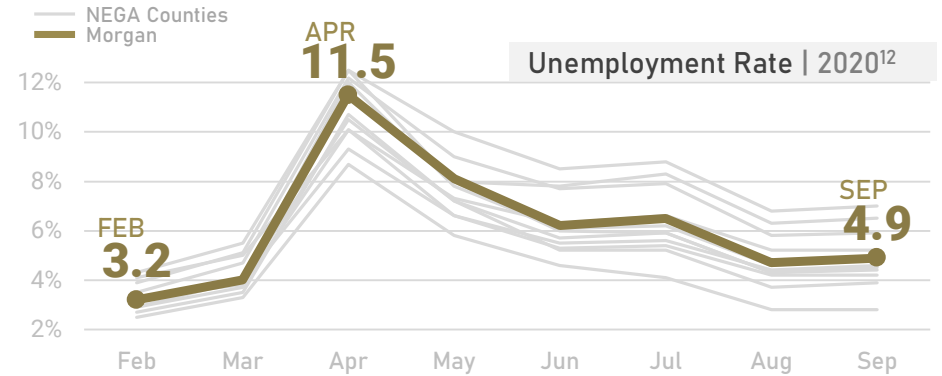
80%
REPORTED
BUSINESSES
AFFECTED
" SOMEWHAT
NEGATIVELY"

100%
REPORTED
"FEAR OF
RETURNING TO
WORK" AS A
CHALLENGE

60%
REPORTED
" SOME INCREASE" IN
THE NEED FOR
SOCIAL SERVICES



Employment



Top 5 Occupations by Unique Job Postings | October 2020¹³

169	Heavy Truck Drivers+ [1]	1
35	Unclassified Occupation	2
34	Supervisors Of Retail Workers [2]	3
26	Stockers And Order Fillers	4
24	Retail Salespersons	5

Top 5 Companies by Job Postings | October 2020¹⁴

RETAIL+LOGISTICS	20	Wal-Mart, Inc.	1
RETAIL+LOGISTICS	18	Dollar General	2
OTHER	18	Randstad N.V.	3
EDS+MEDS	16	Morgan Medical Corporation	4
OTHER	16	Central Garden & Pet Company	5

Coronavirus Impact Survey

CITY GOVERNMENT **3**
COUNTY GOVERNMENT **1**
DEVELOPMENT AUTHORITY **1**
5
RESPONDENTS

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York

Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor

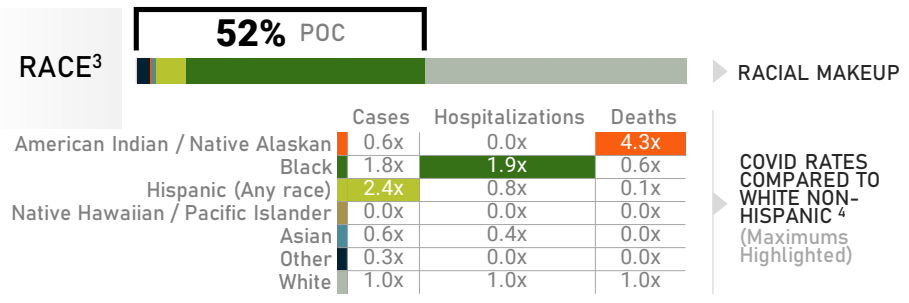
Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers

NEWTON COUNTY

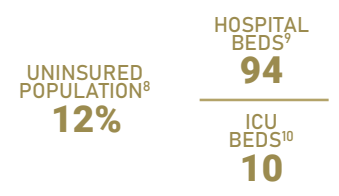
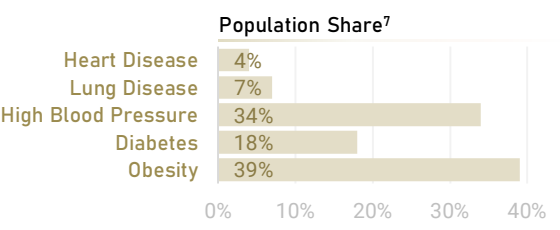
111,744¹
POPULATION



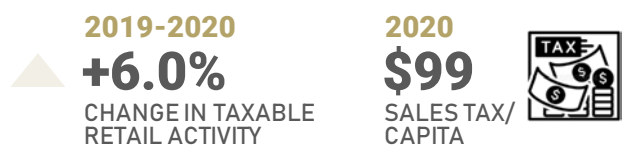
Demographics



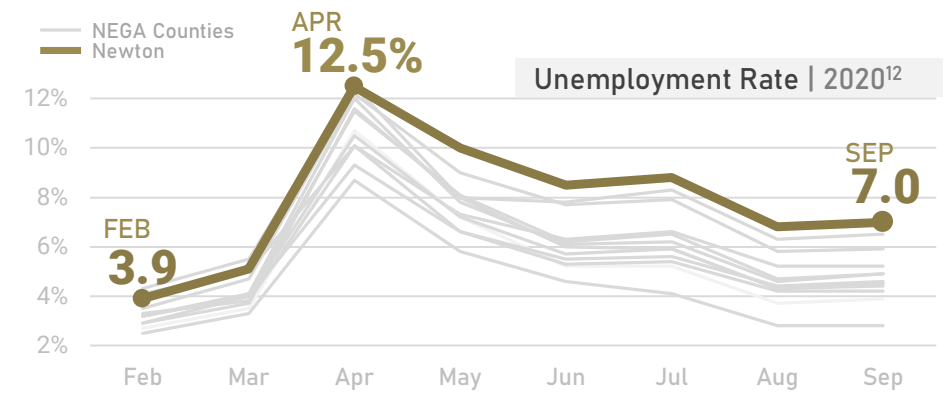
Health



Sales Tax¹¹



Employment



Top 5 Occupations by Unique Job Postings | October 2020¹³

460	Heavy Truck Drivers+ [1]	1
244	Registered Nurses	2
107	Supervisors Of Retail Workers [2]	3
105	Unclassified Occupation	4
81	Retail Salespersons	5

Top 5 Companies by Job Postings | October 2020¹⁴

OTHER	71	Becton, Dickinson and Company	1
EDS+MEDS	68	Piedmont Healthcare	2
OTHER	52	Cynet Systems Inc.	3
OTHER	42	Soliant Health, Inc	4
RETAIL+LOGISTICS	40	Dollar General	5

Coronavirus Impact Survey



¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals; ⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers

OCONEE COUNTY

40,280¹
POPULATION

Demographics

AGE²

24%

55+

<55

<35

<15

MEDIAN AGE

41.1

RACE³

15%

RACIAL MAKEUP

	Cases	Hospitalizations	Deaths
American Indian / Native Alaskan	0.0x	0.0x	0.0x
Black	1.2x	3.9x	2.0x
Hispanic (Any race)	1.7x	1.2x	0.0x
Native Hawaiian / Pacific Islander	40.9x	260.9x	0.0x
Asian	0.4x	0.0x	0.0x
Other	1.2x	2.8x	0.0x
White	1.0x	1.0x	1.0x

COVID RATES COMPARED TO WHITE NON-HISPANIC⁴
(Maximums Highlighted)

INCOME⁵

27%

<\$25K <\$50K <\$100K \$100K+

MEDIAN INCOME

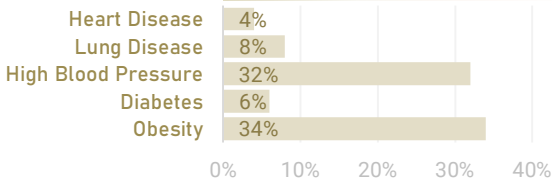
\$89K

SNAP HHs⁶

4%

Health

Population Share⁷



UNINSURED POPULATION⁸
7%

HOSPITAL BEDS⁹
0
ICU BEDS¹⁰
0

Sales Tax¹¹

2019-2020

-3.2%

CHANGE IN TAXABLE RETAIL ACTIVITY

2020

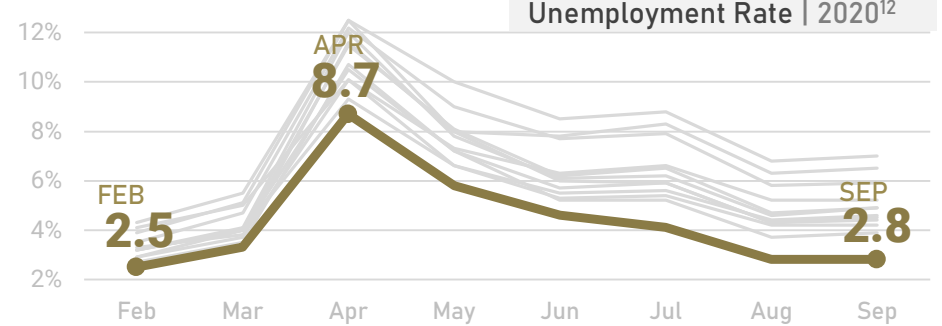
\$136

SALES TAX/CAPITA



Employment

NEGA Counties
Oconee



Top 5 Occupations by Unique Job Postings | October 2020¹³

239	Heavy Truck Drivers+ [1]	1
56	Unclassified Occupation	2
51	Home Health/Personal Care Aides	3
43	Registered Nurses	4
41	Stockers And Order Fillers	5

Top 5 Companies by Job Postings | October 2020¹⁴

RETAIL+LOGISTICS	49	Amazon	1
OTHER	37	Home Instead Senior Care	2
RETAIL+LOGISTICS	21	Racetrac Petroleum, Inc.	3
OTHER	19	Health Care Providers Inc.	4
RETAIL+LOGISTICS	17	R.E. Garrison Trucking, Inc.	5
EDS+MEDS	17	University of North Georgia	5

Coronavirus Impact Survey

CITY GOVERNMENT **2**
COUNTY GOVERNMENT **1**
CHAMBER OF COMMERCE **1**

4 RESPONDENTS

75%
REPORTED BUSINESSES AFFECTED "SOMEWHAT NEGATIVELY"

100%
REPORTED RETAIL TRADE AS BEING MOST AFFECTED IN THE COMMUNITY

100%
REPORTED A QUARTER OF BUSINESSES HAVE REMAINED CLOSED

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York

Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor

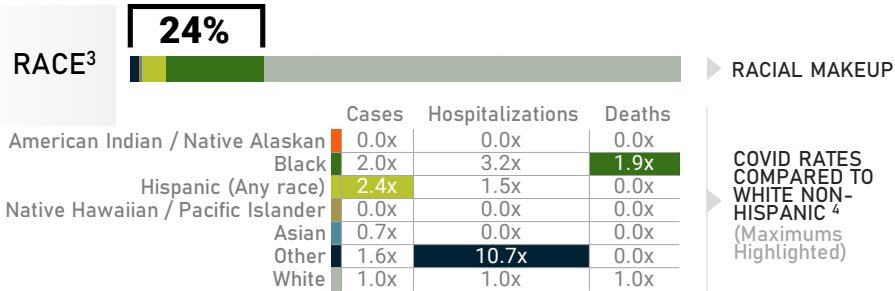
Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers

OGLETHORPE COUNTY

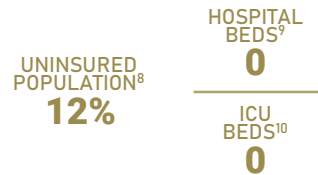
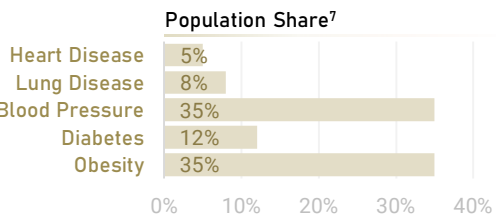
15,259¹
POPULATION



Demographics



Health

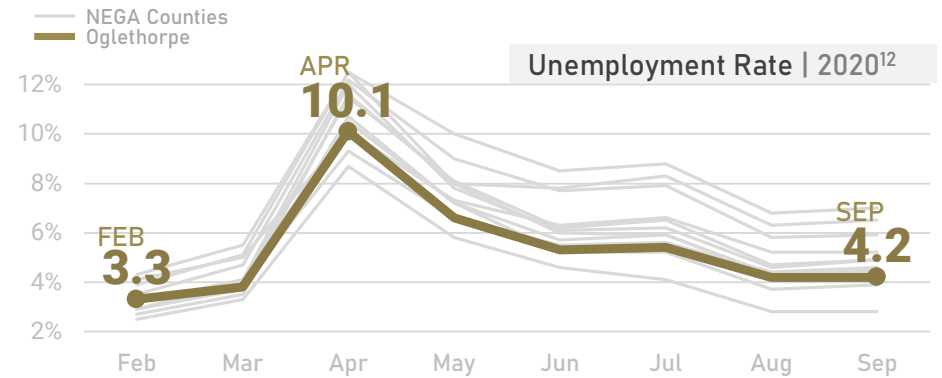


Sales Tax¹¹

2019-2020
+8.6%
CHANGE IN TAXABLE
RETAIL ACTIVITY

2020
\$44
SALES TAX/
CAPITA

Employment



Top 5 Occupations by Unique Job Postings | October 2020¹³

191	Heavy Truck Drivers+ [1]	1
10	Home Health/Personal Care Aides	2
7	Passenger Vehicle Drivers [2]	3
7	Driver/Sales Workers	3
7	Light Truck Drivers	3

Top 5 Companies by Job Postings | October 2020¹⁴

RETAIL+LOGISTICS	24	R.E. Garrison Trucking, Inc.	1
RETAIL+LOGISTICS	12	Marten Transport, Ltd.	2
RETAIL+LOGISTICS	10	Werner Enterprises, Inc	3
RETAIL+LOGISTICS	9	Amazon	4
RETAIL+LOGISTICS	9	Shaffer Trucking	4

Coronavirus Impact Survey

6 RESPONDENTS

CITY GOVERNMENT **4**

COUNTY GOVERNMENT **2**

67%
REPORTED
AREAS IN THE
COUNTY THAT
LACK RELIABLE
INTERNET

50%
REPORTED
BUSINESSES
AFFECTED
"SOMEWHAT
NEGATIVELY"

50%
REPORTED
ARTS/
ENTERTAINMENT AS
MOST IMPACTED
BUSINESSES

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals;

⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York

Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor

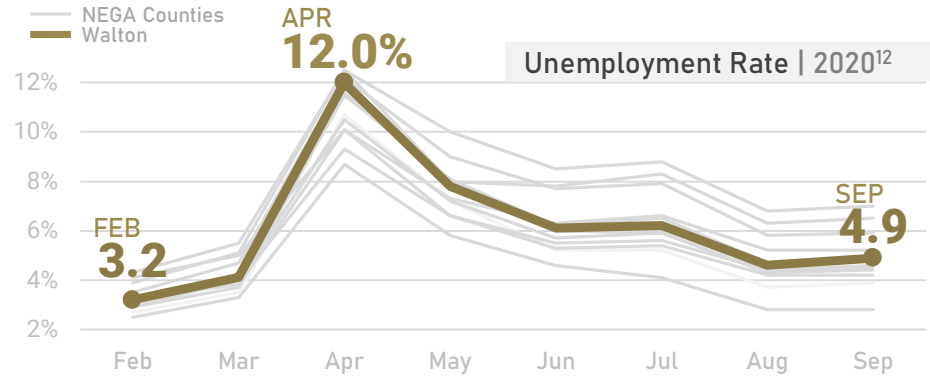
Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] Except Bus Drivers, Transit and Intercity

WALTON COUNTY

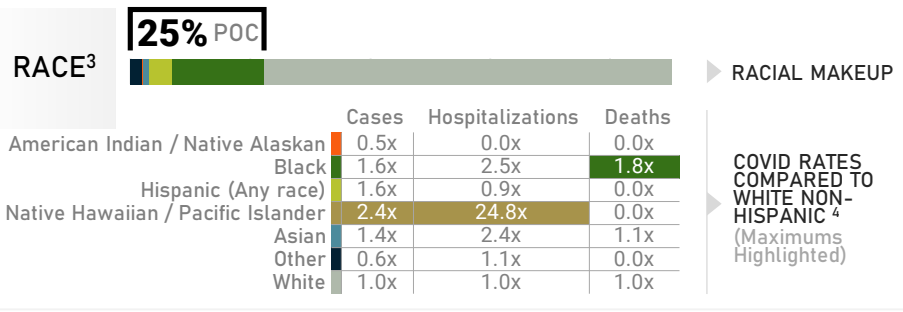
94,593¹
POPULATION



Employment



Demographics



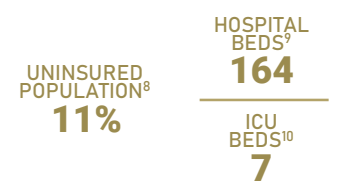
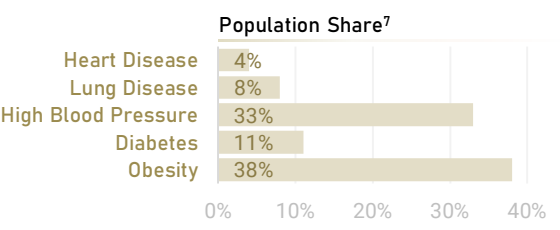
Top 5 Occupations by Unique Job Postings | October 2020¹³

361	Heavy Truck Drivers+ [1]	1
103	Supervisors Of Retail Workers [2]	2
98	Retail Salespersons	3
94	Unclassified Occupation	4
86	Registered Nurses	5

Top 5 Companies by Job Postings | October 2020¹⁴

RETAIL+LOGISTICS	77	Wal-Mart, Inc.	1
RETAIL+LOGISTICS	70	Amazon	2
OTHER	49	Takeda Pharmaceuticals	3
OTHER	47	Soliant Health, Inc	4
EDS+MEDS	45	Piedmont Companies Inc	5

Health

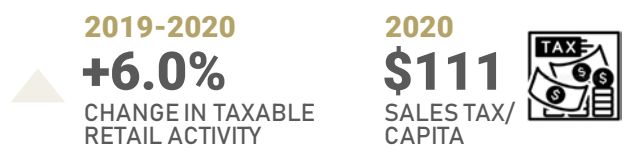


Coronavirus Impact Survey

CITY GOVERNMENT 4
COUNTY GOVERNMENT 2
DEVELOPMENT AUTHORITY 1

7 RESPONDENTS

Sales Tax¹¹



71% REPORTED AREAS IN THE COUNTY THAT LACK RELIABLE INTERNET

43% REPORTED CHANGES IN THE SUPPLY INDUSTRIAL CHAIN

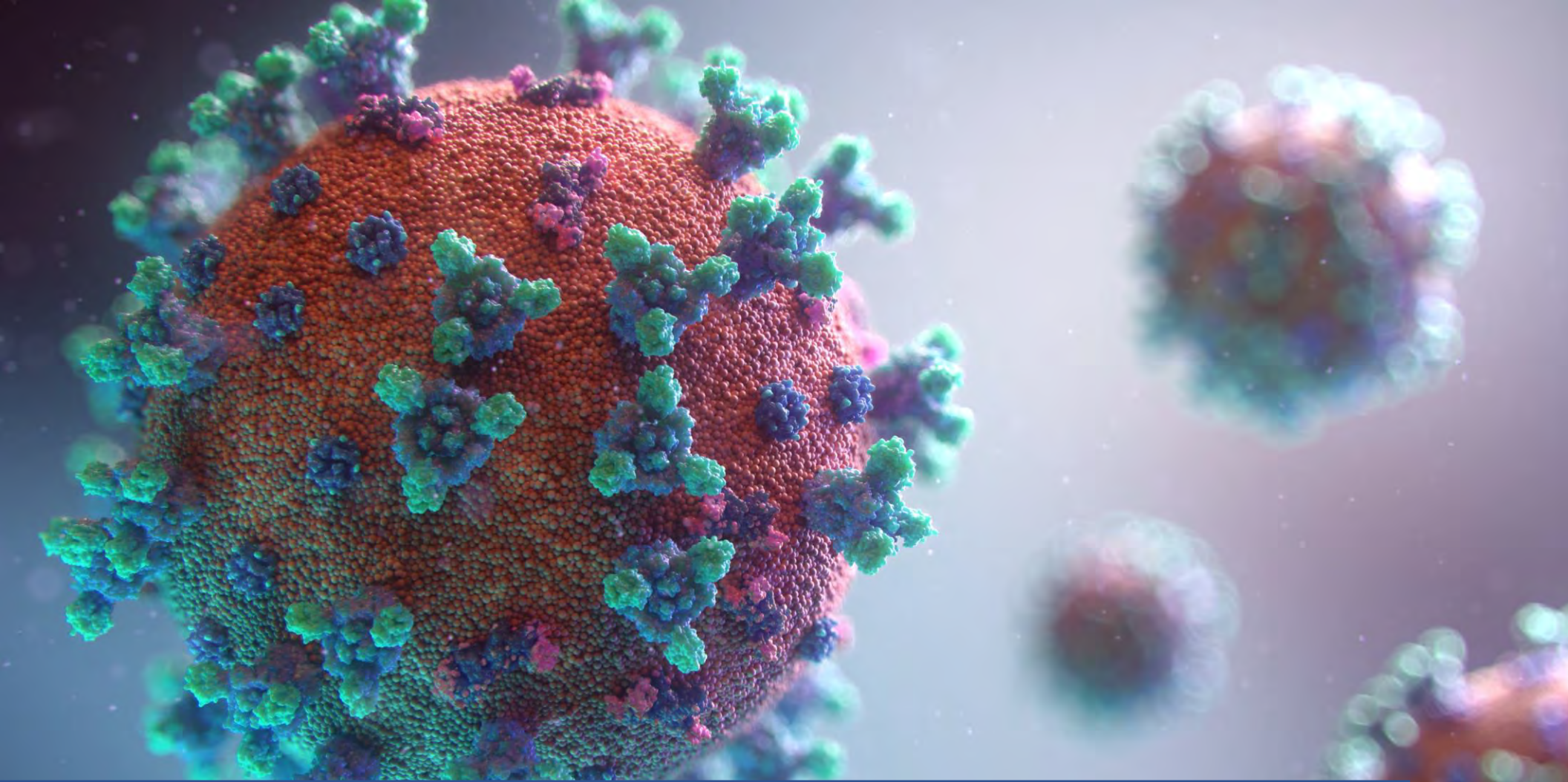
57% REPORTED RETAIL TRADE AS MOST AFFECTED BY THE PANDEMIC

¹ Census 2019 Annual Resident Population Estimates; ² Esri 2020 Estimates; ³ 2014-2018 ACS 5-Year Estimates - Note: All categories except Hispanic include only non-Hispanic individuals; ⁴ Georgia Department of Health - data through December 2020 - not age-adjusted; ⁵ Esri 2020 Estimates; ⁶ Esri County CO-VID-19 Cases and Planning Report; ⁷ PolicyMap & New York Times; ⁸ PolicyMap; ⁹⁻¹⁰ Johns Hopkins University COVID-19 County Status Report - Hospital Beds = Number of Staffed Beds; ¹¹ Georgia Department of Revenue; ¹² US Bureau of Labor Statistics; ¹³⁻¹⁴ EMSI 2020.4Q [1] Heavy and Tractor-Trailer Truck Drivers [2] First-Line Supervisors of Retail Sales Workers

Appendix B

Survey Report: Impact of COVID-19 in Northeast Georgia Businesses

A survey was distributed to employers and local economic development stakeholders during January 2021. The survey received responses from 177 representatives in the Northeast Georgia area, representing 9 counties. The survey results underscore the impact of the coronavirus pandemic on businesses in the region.



Impact of COVID-19 in Northeast Georgia Businesses



SUMMARY OF KEY FINDINGS

The survey of businesses and community leaders in Northeast Georgia provides insight into the economic impact of the coronavirus pandemic on businesses and communities in the region. Here is a summary of the key findings:

- There were 221 responses to the survey. 46 percent of the businesses reported having **10 or less employees**.
- Nearly half of the survey respondents represented **Education, Professional services and Other** sectors. Other category includes Entertainment and Arts, Repair and Other Services and Recreational and Religious Organizations.
- The most common responses to the question about steps businesses have taken in response to COVID-19 include: **Open, Scaled Back Hours/Shifts (38.4 %); Modified Product/Service Offered (30.5%); Employee Teleworking (27.7%); and Special Offers (17.5%)**.
- More than half of the respondents, **56 percent, reported that some of their employees are at risk of unemployment/layoff** as a result of the pandemic crisis and 44 percent did not think this was a risk their business is facing. Only **25 of businesses surveyed expressed concern regarding permanent closure** within six months.
- More than half of the respondents – **55 percent – are very concerned about the impact of the pandemic over the next three months** while 40 percent are very concerned about the future impact over the next six months.
- When asked about, **companies with more than 50 employees reported no risk of closing permanently**, while **companies with 49 and less employees reported some risk of closing**.
- In the next 6 months, businesses expect to face the following challenges: **insufficient staffing to accomplish critical work (31%); a change in staffing due to low demand is expected to occur (23%); higher demand for employee protection (22%); and productivity loss due to lack of remote work capabilities (16%)**.
- An in-depth analysis of data by respondent/company shows that businesses in **Retail, Personal Care, Non-profits, Food Services, Education, and Child Day Care Services reported the highest rate of decline in business revenue**,
- Respondents' top five immediate business needs are: **Professional and leadership development (19%); Advice on identifying new revenue models (16%); Skill development and workforce training programs (15%); Advice on identifying new customer segments (12%); and Core business training (10%)**.
- Community leaders reported that only **18 percent of planned business location, expansion, or relocation projects were not affected by COVID-19 and have continued as planned and 37 percent of projects were put on hold but have resumed**. In contrast, **33 percent of projects were put on hold, and have remained on hold and 12 percent of projects have been cancelled**.
- Community leaders selected these areas as the top five immediate needs for businesses: **Advice on Identifying New Revenue Models (19%); Skill Development and Workforce Training Programs (16%); Advice on Identifying New Customer Segments (16%); Advice on Identifying Potential New Partners to Expand Capacity (12%); and Professional and Leadership Development (12%)**.

INTRODUCTION

Project Overview

The Georgia Tech EDA University Center (EDA UC), in collaboration with the Northeast Georgia Regional Commission (NEGRC), conducted a survey to assess the impact of the COVID-19 pandemic in the Northeast Georgia region. The goal of the project is to collect data on the economic needs of communities affected by the coronavirus pandemic through loss of employment, loss of income, loss of business revenue, or lack of resources.

Based on the information collected, the Georgia Tech team will provide participating communities with short-term recovery planning for building a stronger, more resilient businesses for the long-term.

With the assistance of NEGRC, the survey was shared with local government, chambers of commerce, economic development agencies and other partners of NEGRC in all 12 counties. The survey was distributed via an email to businesses within the region. The data summarized in this report was collected between January 5 and 27, 2021.

The survey included a total of 18 questions for businesses and 5 questions for leadership of local government, chambers of commerce, economic development agencies, development authorities and other community leaders. The questions were designed to collect information on businesses' location (city, county), size in terms employment and revenue, and several questions related to challenges brought upon by the Covid-19 crisis and the type of assistance needed.

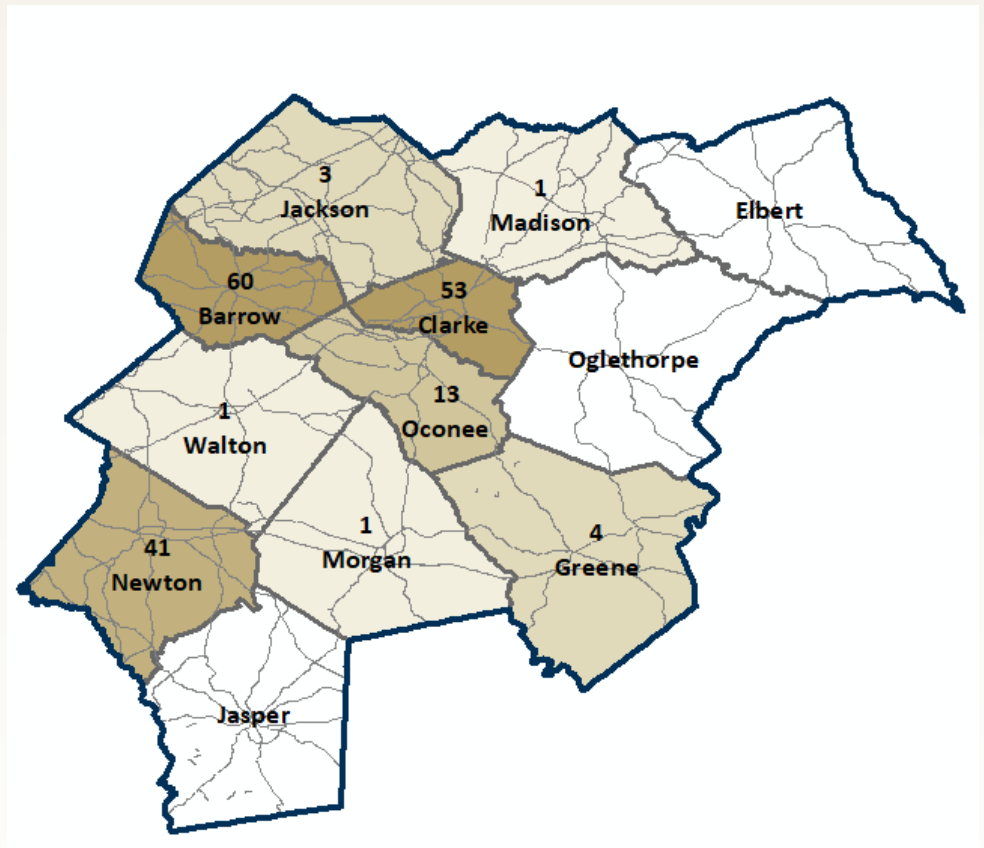
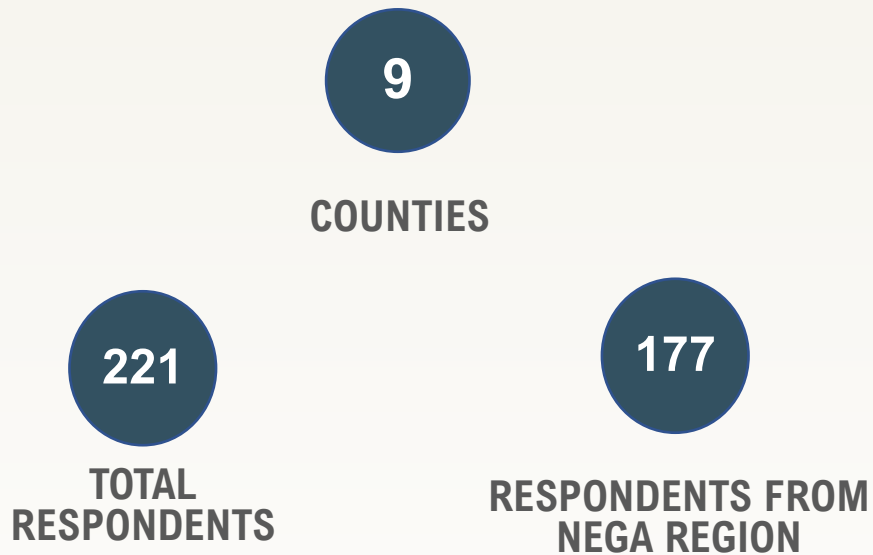
The survey findings are presented in two groups: **1)Survey Findings-Business Impacts** which summarizes the responses of respondents representing businesses; and **2)Survey Findings-Community Business Impacts** which summarizes responses community leaders.

This project is funded by the Economic Development Administration (EDA), the Coronavirus Aid, Relief, and Economic Security (CARES) Act grant.

SURVEY FINDINGS: BUSINESS IMPACTS

Businesses operating in the region's 12 counties were invited to participate in this survey. There were a total of 221 responses¹. Several respondents were located outside the 12-county region and therefore, were excluded from this analysis. As the map below shows, survey respondents are located in the following 9 counties: Barrow, Clarke, Greene, Jackson, Madison, Morgan, Newton, Oconee, and Walton. Barrow, Clarke and Newton counties

Respondents



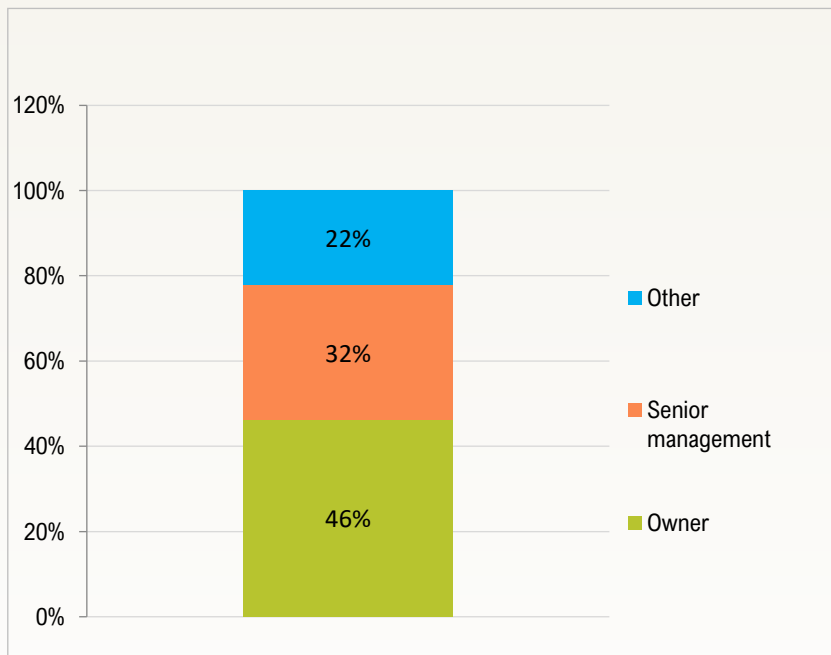
¹ Incomplete responses and responses from counties outside the 12-county region were removed from this analysis.

SURVEY FINDINGS: BUSINESS IMPACTS

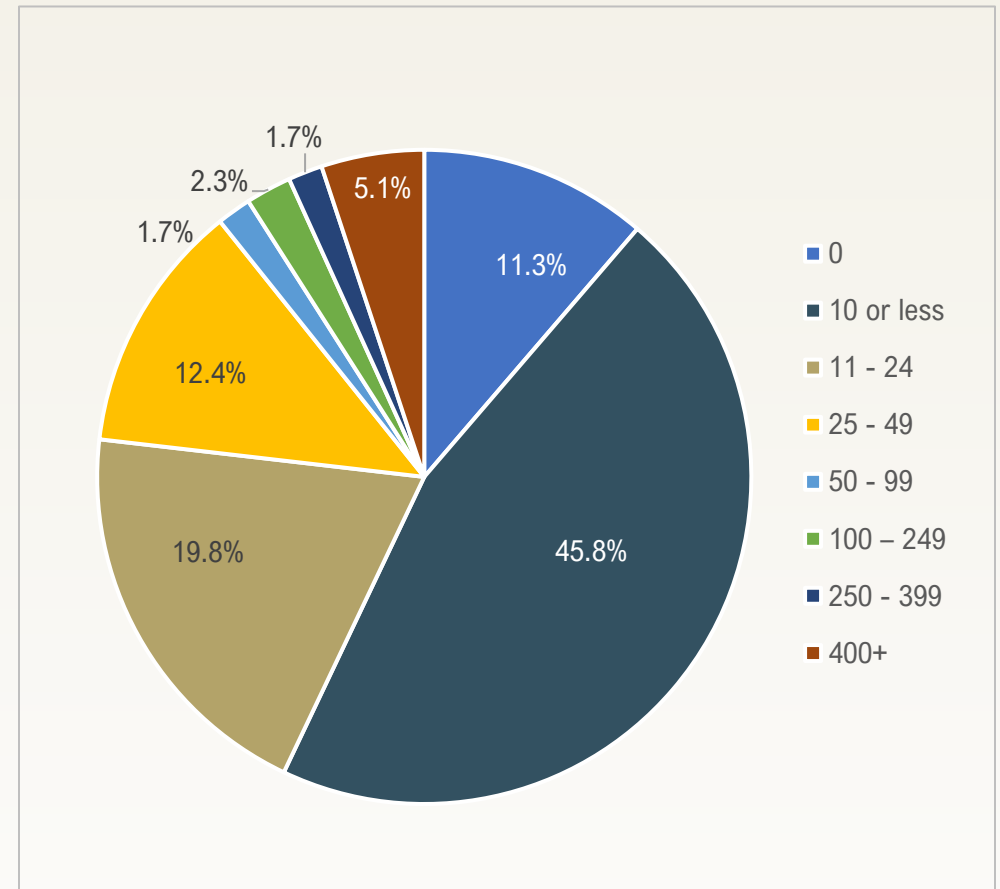
Nearly 46 percent of the businesses reported having 10 or less employees; 20 percent of respondents have 11 – 24 employees and 12 percent have 25-49 employees.

46 of the respondents were company owners and 32 percent were senior managers. The remainder, 22 percent, held other roles within the company.

Q: What is your role with the company?

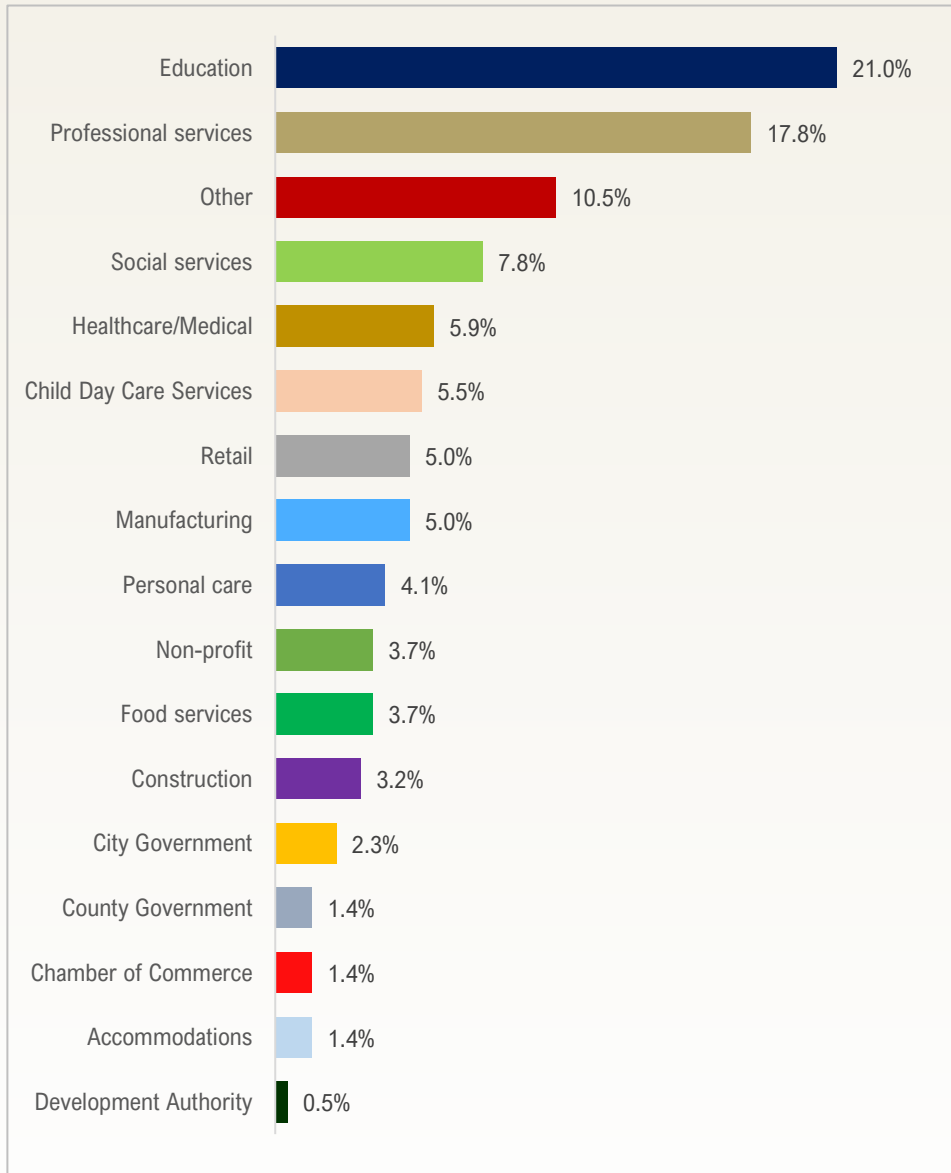


Q: How many employees does the company have?



SURVEY FINDINGS: BUSINESS IMPACTS

Q: What type of organization do you represent?



Survey respondents represented a diverse cross-section of industries. *Education*, *Professional services* and *Other* were the most represented sectors accounting for nearly half of the responses.

Given the large number of responses under *Other* category, the Georgia Tech team grouped responses under this category based on additional information provided by these companies. As shown in the chart below, the *Other* category includes *Entertainment and Arts*, *Repair and Other Services* and *Recreational and Religious Organizations*.

“Other” Industries

Entertainment and Arts	Entertainment	1
	Event facility	1
	Event planning	1
	Filming	1
Repair and other Services	Automotive detailing services (cleani	1
	Electrical work	3
	Landscape and Horticultural Service	2
	Heavy equipment rental	1
	e-commerce	1
	Staffing Services (Employment)	1
	Transportation	3
Recreational and Religious Institutions	Religious Organizations	2
	Fitness and Recreational Services	2
Grand Total		21

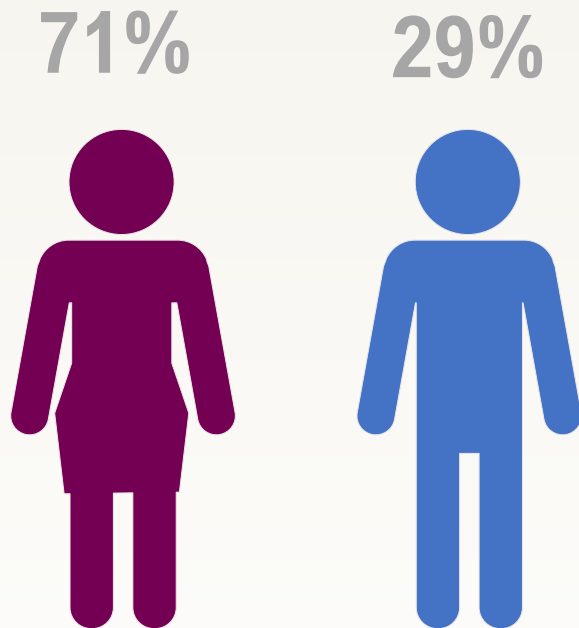
SURVEY FINDINGS: BUSINESS IMPACTS

RESPONDERS' DEMOGRAPHIC PROFILE

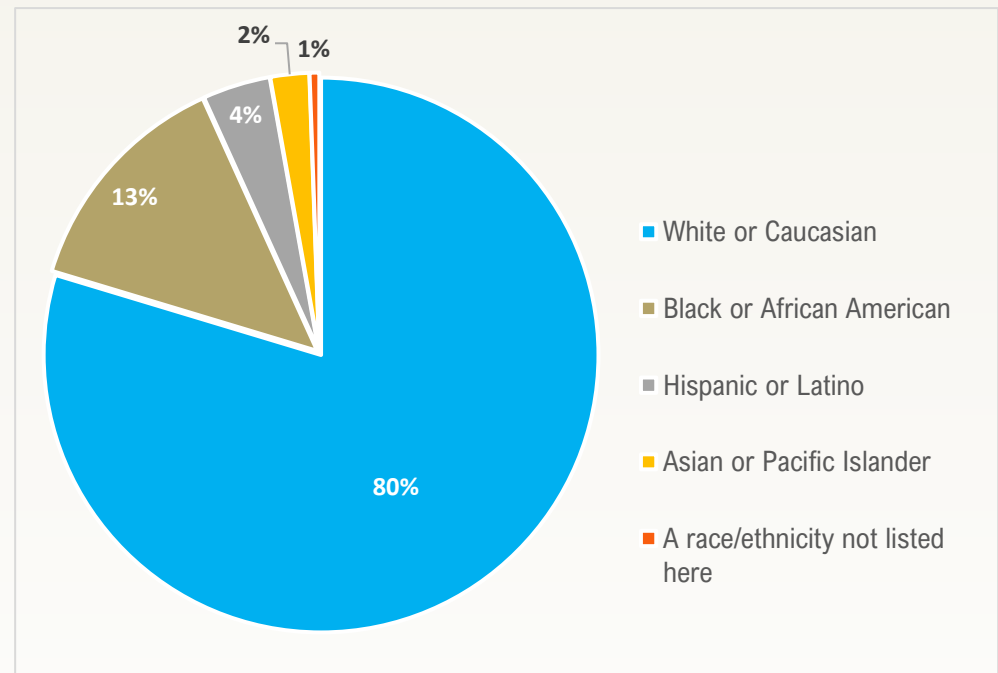
71 percent of the survey responders were females and 29 percent were males.

As the chart shows, 80 percent of the respondents were White or Caucasian; 13 percent were Black or African American; 4 percent were Hispanic or Latino; 2 percent were Asian or Pacific Islander; and 1 percent were a race/ethnicity not listed as an option.

Gender



Ethnicity



SURVEY FINDINGS: BUSINESS IMPACTS

Survey results underscore the severe impact of the coronavirus pandemic with 89 percent of the businesses surveyed reporting financial, staffing, customer and other losses since the disruptions caused by the COVID-19 pandemic began.

Business that experienced losses due to COVID-19 reported that the greater impact was felt in sales. *Slower sales/no sales* impacted 57 percent of the respondents. *Employee absenteeism* and *supply chain disruptions* impacted 43 percent and 24 percent of the respondents, respectively.

Q: Has your business experienced any financial, staffing, customer, or other losses due to COVID-19?

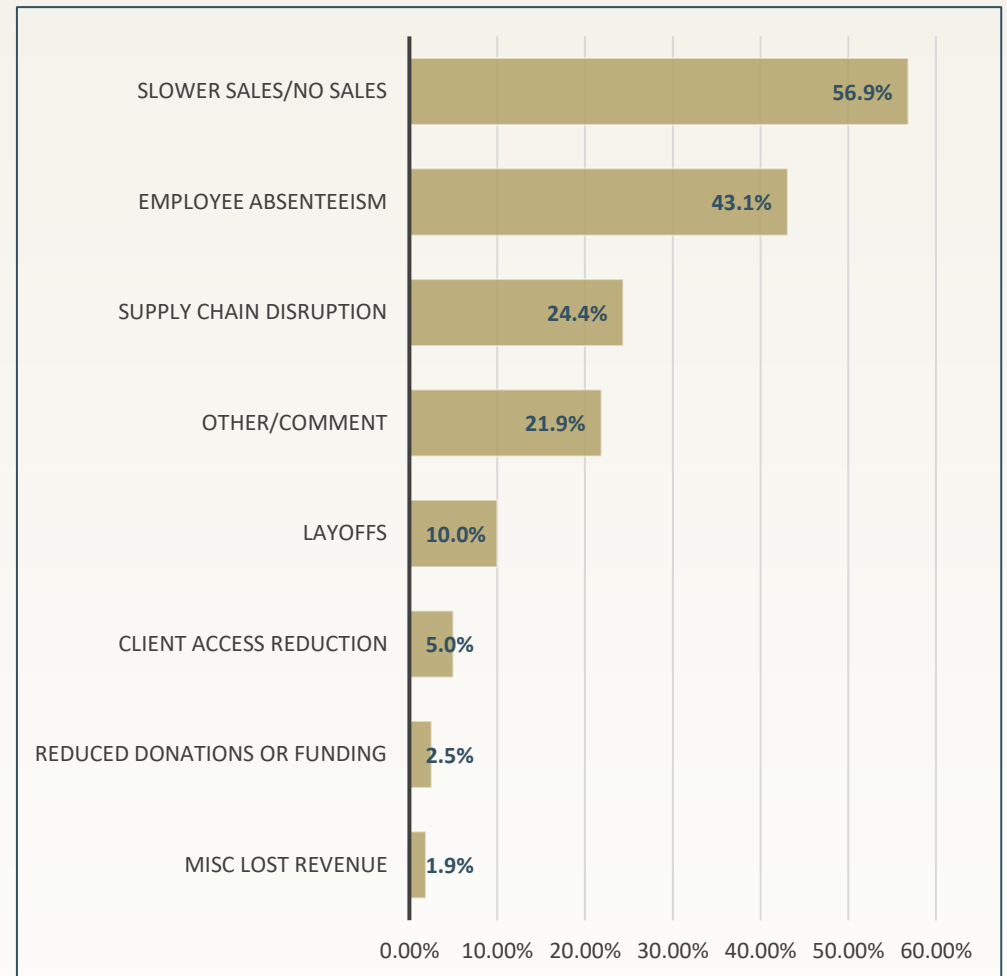
90%



10%



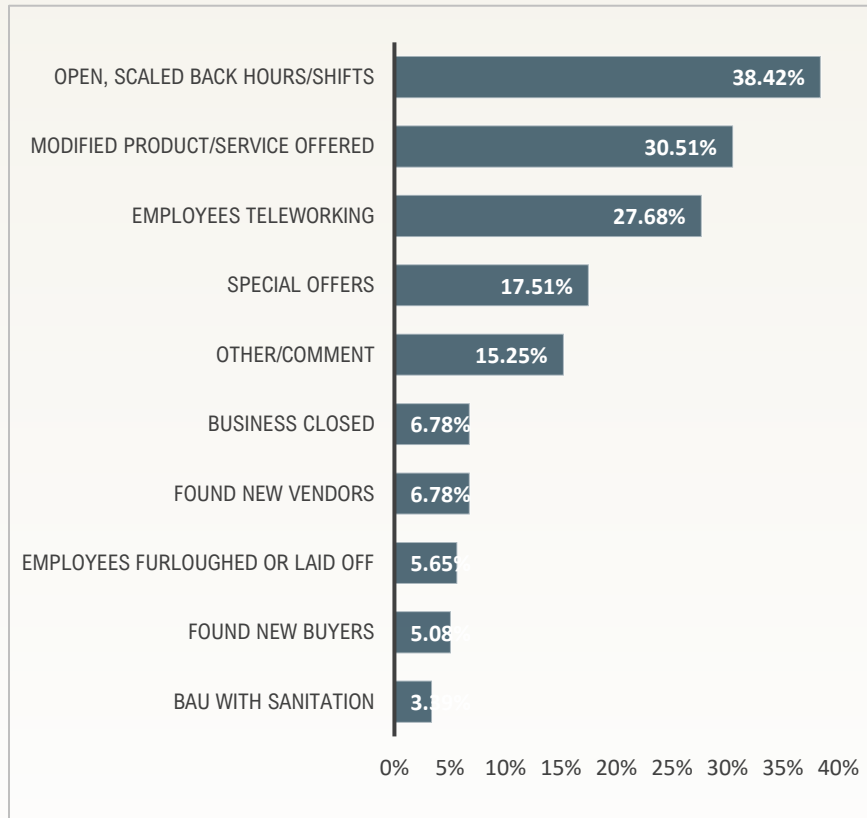
Q: If yes, please describe the loss your business is experiencing due to COVID-19 (check all that apply)



SURVEY FINDINGS: BUSINESS IMPACTS

When asked about steps businesses have taken in response to COVID-19, the most common responses were: *Open, Scaled Back Hours/Shifts* (38.4 %); *Modified Product/Service Offered* (30.5%); *Employee Teleworking* (27.7%); and *Special Offers* (17.5%).

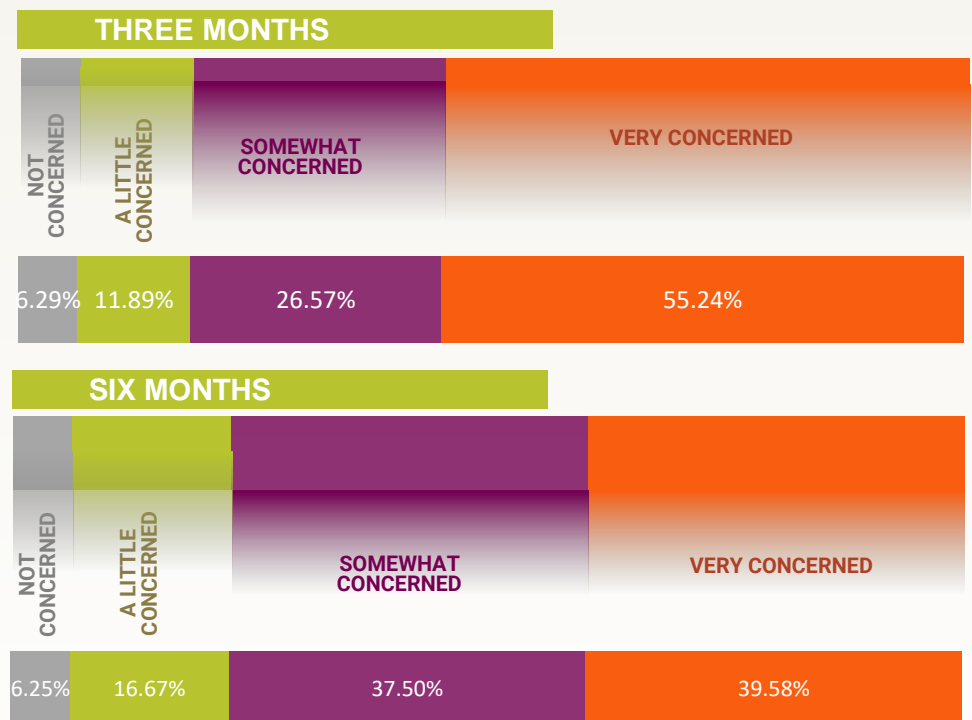
Q: What steps has your business taken so far in response to COVID-19?



Concerns about future and continued impact of COVID-19 varies based on timeframe (three vs. six months). More than half of the respondents – 55 percent – are *very concerned* about the impact of the pandemic over the next three months while 40 percent are *very concerned* about the future impact over the next six months.

The chart below provides more details on the levels of concern about the impact of COVID-19 over the next three and six months.

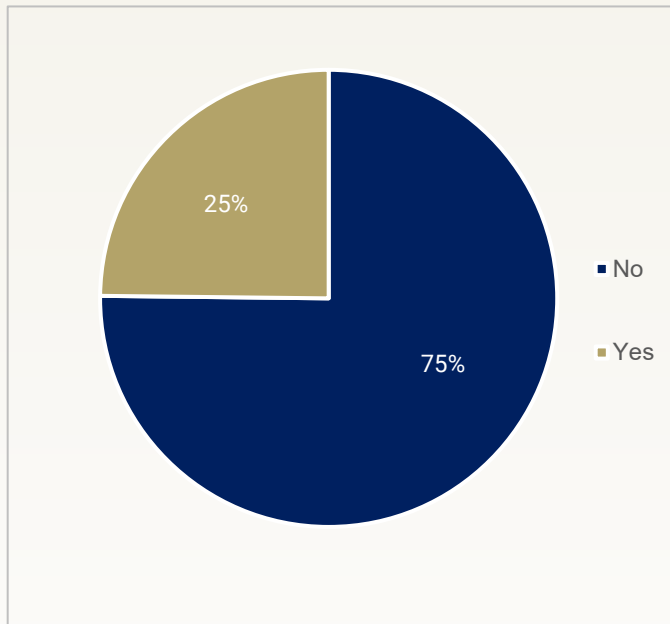
Q: How concerned are you about the future impact of COVID-19 on your business over the next...



SURVEY FINDINGS: BUSINESS IMPACTS

Only 25 of businesses surveyed expressed concern regarding permanent closure within six months. Not surprisingly, this is a concern of companies in *food services*, *personal care* and *nonprofit* sectors.

Q: Are you concerned that your business may be forced to close permanently within the next six months?



86%



Food Services

63%



Personal Care

33%



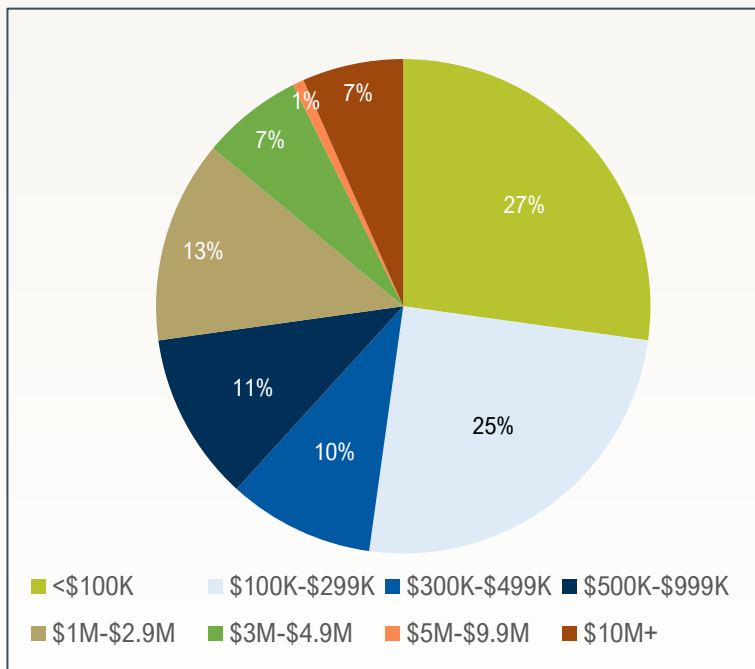
Non-Profits

SURVEY FINDINGS: BUSINESS IMPACTS

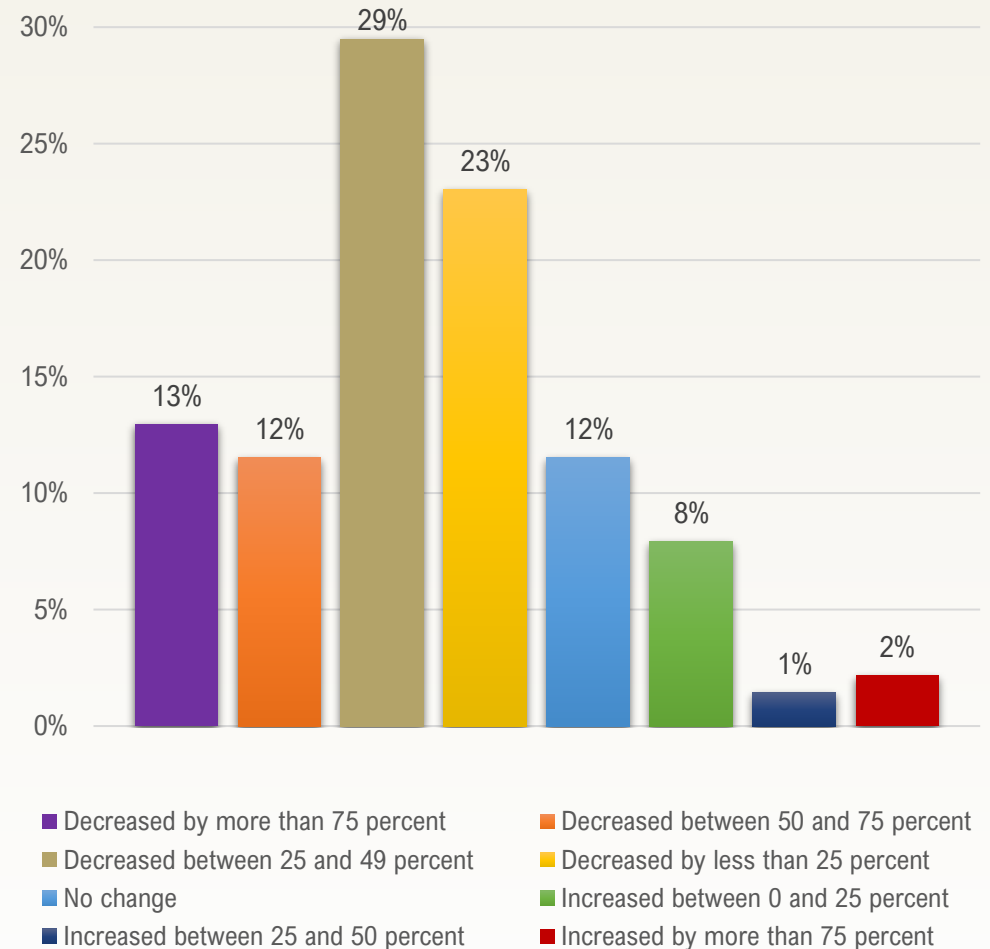
The chart below displays the respondents' business revenues in 2019. As the chart below shows, more than half of businesses surveyed reported revenues of up to \$299,000 (<\$100K – 27% and \$100k-\$299K – 22%). Overall, respondents represented companies with various levels of revenue, an indicator of the broad range of business types and sizes responding the survey.

Overall, 77 percent of all respondents reported a loss in business revenue compared to 2019. An in-depth analysis of data by respondent/company shows that the sectors reporting the highest drop in revenue, not surprisingly, include *Retail, Personal Care, Non-profits, Food Services, Education, and Child Day Care Services*. 12 percent of businesses reported no change and 11 percent report an increase.

Q: What were your business revenues last year?



Q: Comparing your business revenue from 2019 to this year, how have your revenues changed as a result of COVID-19 pandemic?

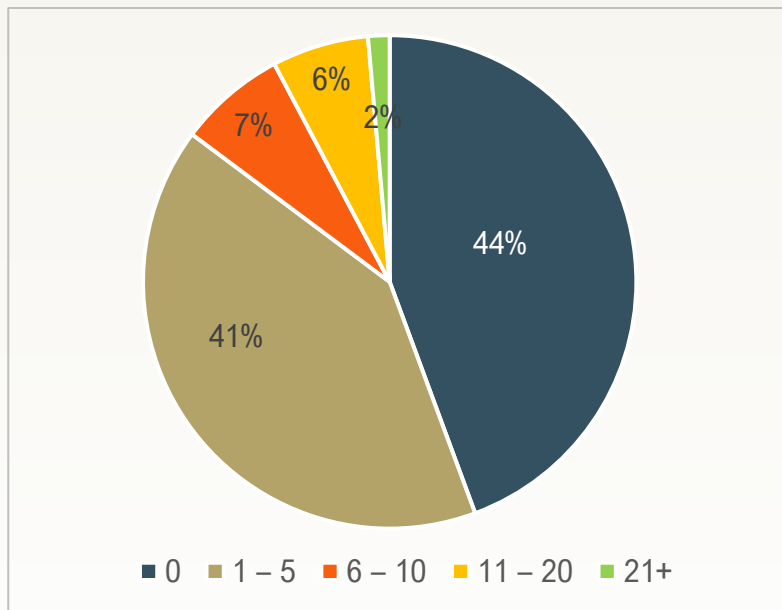


SURVEY FINDINGS: BUSINESS IMPACTS

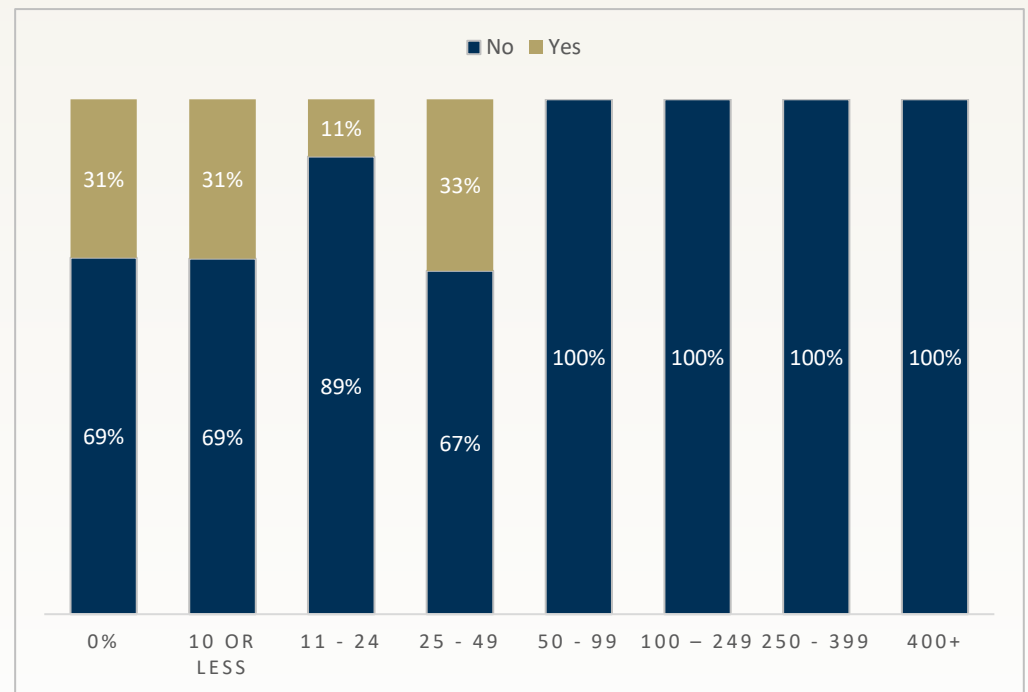
More than half of the respondents, *56 percent*, reported that some of their employees are at risk of unemployment/layoff as a result of the pandemic crisis and 44 percent did not think this was a risk their business is facing. *Hardest hit sectors include Food Services, Personal Care, Education, Childcare, Non-Profits, Accommodations.*

When asked about the risk of closing permanently, companies with more than 50 employees responded no. Companies with no employees (sole proprietors), 10 employees and less and 25-49 employees reported some risk of closing permanently. These responses underscore the vulnerability of businesses with less than 50 employees.

Q: How many of your employees are at risk of unemployment and/or layoffs as a result of COVID-19?



Q: Risk of Closing Permanently by Number of Employees:

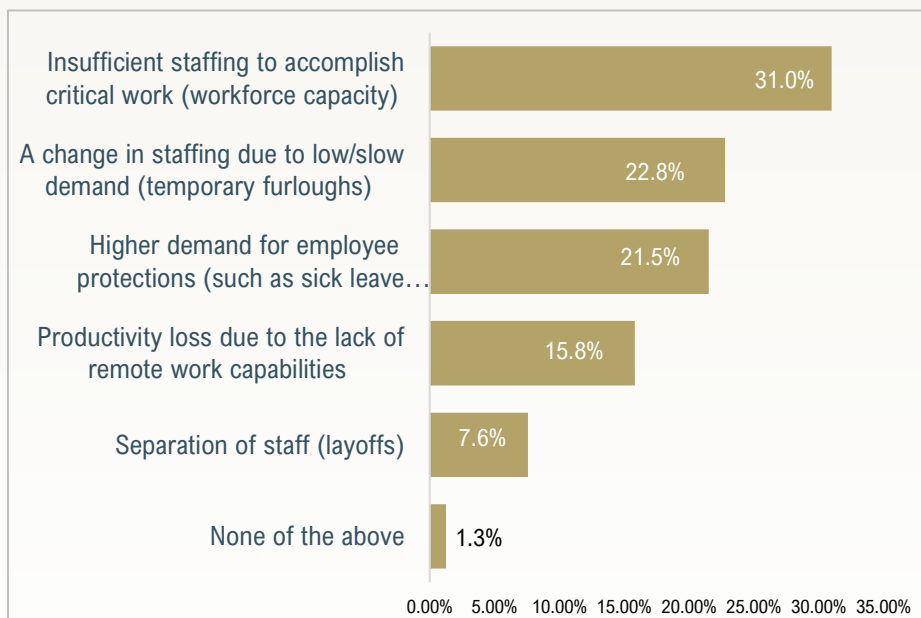


SURVEY FINDINGS: BUSINESS IMPACTS

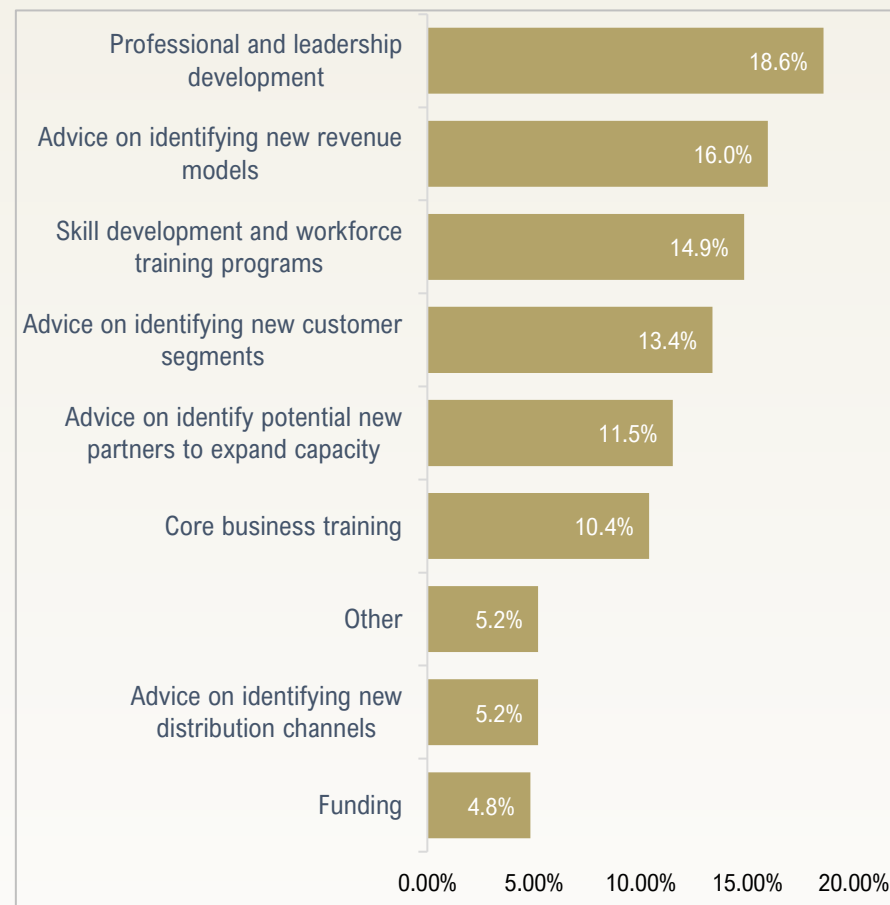
Regarding challenges businesses may face in the next 6 months, 31 percent of businesses indicated that they expect *insufficient staffing to accomplish critical work*. A change in staffing due to low demand is expected to occur by nearly 23 percent of respondents. Nearly 22 percent of respondents expect higher demand for employee protection, and 16 percent expect productivity loss due to lack of remote work capabilities.

The survey includes a set of questions related to the type of assistance that would be helpful to businesses right now. The Georgia Tech EDA UC team will use the information gathered from this question to design effective programs that will help businesses navigate the economic distress caused by the coronavirus pandemic and assist them with their recovery efforts.

Q: As a result of COVID-19, which of the following does your business expect to occur in the next six months?



Q: What type of assistance would be helpful to your business right now?

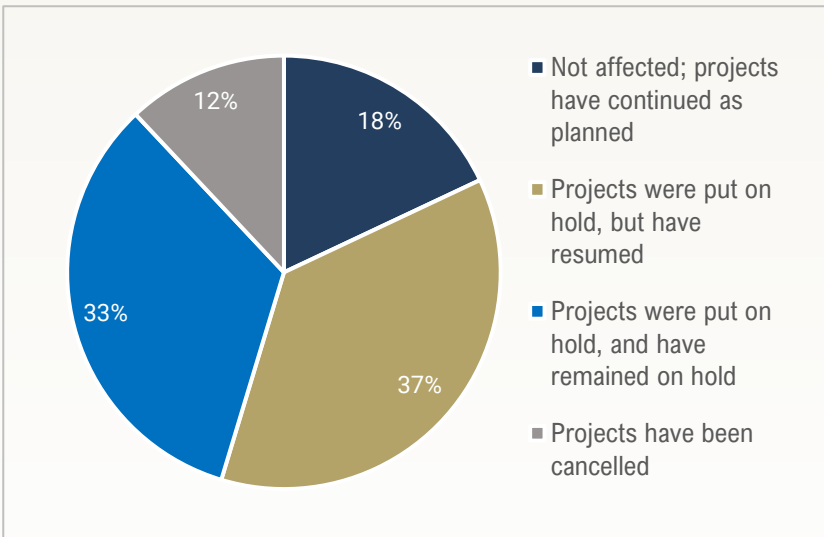


As the graph above shows, the top five immediate needs are: *Professional and leadership development (19%)*; *Advice on identifying new revenue models (16%)*; *Skill development and workforce training programs (15%)*; *Advice on identifying new customer segments (12%)*; and *Core business training (10%)*.

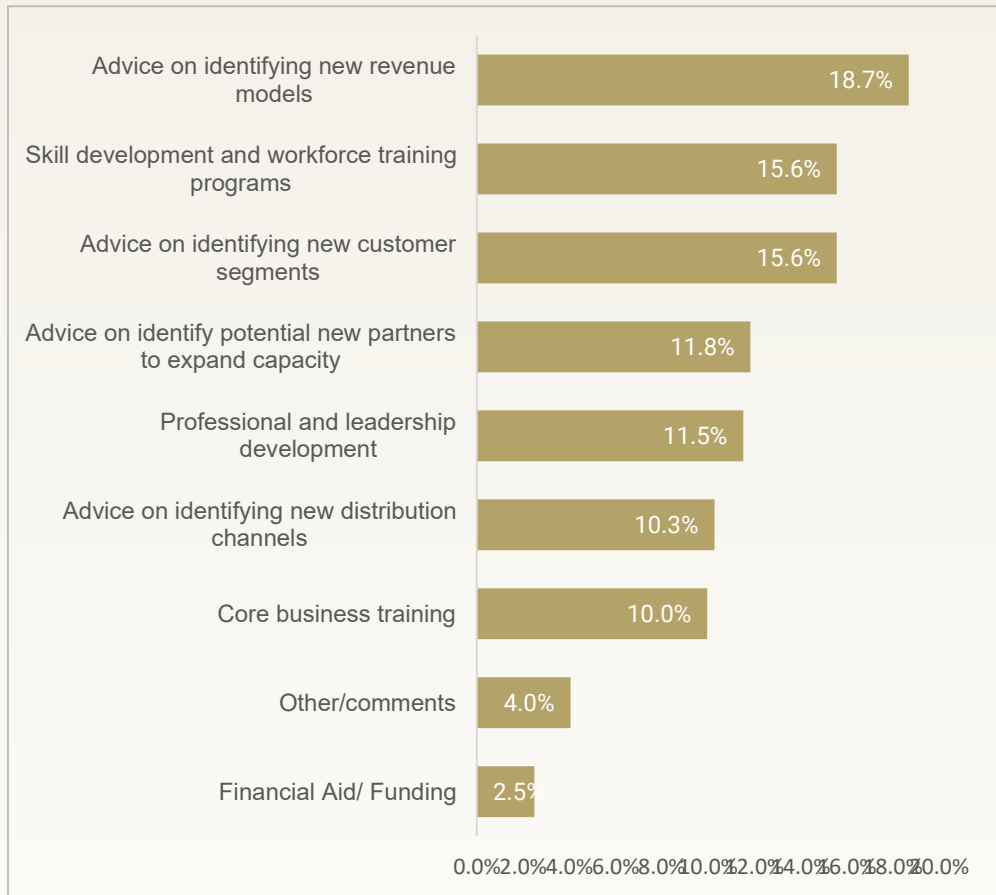
SURVEY FINDINGS: COMMUNITY BUSINESS IMPACTS

The survey included a few questions for community leaders (local government, economic development agencies, chambers of commerce, etc.). Community leaders were asked whether planned business location, expansion, or relocation projects were affected due to the pandemic. Respondents reported that only 18 percent of projects were not affected/have continued as planned and 37 percent of projects were put on hold but have resumed. In contrast, 33 percent of projects were put on hold, and have remained on hold and 12 percent of projects have been cancelled.

Q: How have planned business location, expansion, or relocation projects in your community been affected due to the pandemic?



Q: What type of assistance would be helpful to the businesses in your community right now? Check all that apply.



Community leaders were also asked about the type of assistance that would be helpful to businesses right now. The top five immediate needs are:

- *Advice on Identifying New Revenue Models (19%)*
- *Skill Development and Workforce Training Programs (16%)*
- *Advice on Identifying New Customer Segments (16%)*
- *Advice on Identifying Potential New Partners to Expand Capacity (12%)*
- *Professional and Leadership Development (12%)*

SURVEY FINDINGS: COMMUNITY BUSINESS IMPACTS

Q: What else would you like to share regarding your community's challenges in response to COVID-19?

Community leaders had the option to report on other challenges businesses in Northeast Georgia were facing. The most common challenges mentioned, include:

- Educational development opportunities for business leaders
- Support for small businesses
- Childcare
- Impact of quarantine; masks
- Back to work limitations
- Income loss
- Unemployment
- Community resilience



ABOUT THE TEAM

Georgia Institute of Technology, Enterprise Innovation Institute (EI²)

The Enterprise Innovation Institute (EI²) of the Georgia Institute of Technology (Georgia Tech) is the economic development and business outreach organization for the university. It serves as the primary vehicle for economic impact locally, regionally, and globally.

EI² is the largest and most comprehensive university-based program of business and industry assistance, technology commercialization, and economic development in the United States. When compared to counterparts at other universities, EI² is unique because it brings many areas of expertise into a single organization and is able to connect clients to multiple programs or services to meet their individual needs.

EI² serves startups, industry, the public sector, and students to improve competitiveness, turn ideas into viable businesses, and make a positive impact on the economy. In addition, EI² provides connections to Georgia Tech's vast resources, including world-class research, state-of-the-art facilities, internationally recognized experts, and upper-echelon students.

Project team

The Georgia Tech EDA UC team's expertise includes:

- *Community Economic Development*
- *Feasibility and Impact Studies*
- *Economic and Fiscal Impact Analysis*
- *Curriculum Development for Innovation, Commercialization and Entrepreneurship*
- *Lean Startup Methodology*
- *Incubation Program Management*



NEGRC
NORTHEAST GEORGIA
REGIONAL COMMISSION

305 Research Drive

Athens, GA 30605

negrc.org