



CEDS

Comprehensive
Economic
Development
Strategy



HEART OF TEXAS
COUNCIL OF GOVERNMENTS

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Introduction

The Heart of Texas region is made up of six counties: Bosque, Falls, Freestone, Hill, Limestone, and McLennan, and has a population of about 366,000 people. The region consists of over 50 municipalities and more than 100 communities, covering about 5,648 square miles. Conveniently located between, Austin, Dallas, Houston, and San Antonio, the region's emerging role as a manufacturing, production, warehouse, distribution, and logistics hub is supported by an available workforce, land space, freeways, and access to airports, rails, and shipping ports.

The Heart of Texas region is heavily agricultural.¹ Five of its six counties are considered “small” by federal standards and are classified as 100% rural. McLennan County, the largest of the six counties, has a strong industrial and commercial center in the City of Waco with smaller industrial and commercial centers in Hillsboro in Hill County and Mexia in Limestone County.

Historically, the Heart of Texas region was heavily dependent on jobs and revenue from coal, oil, and gas. Recently, however, there has been a shift away from fossil fuels, and the closure of the Big Brown Coal plant left the region with an economic gap. Because the region has a skilled manufacturing workforce, and is conveniently located in central Texas, with easy access to the fastest growing metropolitan areas in the country— Austin, Dallas, Houston, and San Antonio — there are opportunities to diversify the economy. The region can do so by attracting manufacturing and production facilities and becoming a hub for warehouse, distribution, logistics and supply centers. The abundance of land, and a climate suitable for wind energy has also brought renewable energy in the form of wind and solar farms, creating alternate sources of energy, revenue, and jobs in the region.

The Heart of Texas region is in transition and poised for growth. Not only are new industries flocking to the area, helping the economy to rebound from losses in oil and gas jobs, but investments in infrastructure and retail and entertainment centers are making the largest city, Waco, a destination. With a concerted economic development strategy, it will be possible to maximize opportunities and attract transformational investment to the area.

The Heart of Texas Economic Development District, Inc. 2020-2025 Comprehensive Economic Development Strategy (CEDS) is a roadmap to diversify and strengthen the regional economy and will guide local, state, and federal investment priorities by providing an action plan.

The 2020 update of the CEDS brings together important state and local economic development initiatives through a focus on creating economic diversity, attracting businesses, strengthening the talent supply, utilizing environmental resources, and focusing on quality of life.

The **Summary Background** provides an overview of the region's economic situation, including demographic and socioeconomic data, environmental, geographic, climatic, and cultural resources, infrastructure assets, industries, factors directly affecting economic performance, other factors relating to economic performance, and opportunity zones.

It is followed by a **SWOT Analysis** that describes in detail the strengths, weaknesses, opportunities and threats to the region, based on information in the Summary Background. This directly informs the **Strategic Direction and Action Plan** which will detail the activities necessary to achieve the goals and objectives of the CEDS.

The **Survey of Economic Development Resources** provides information on **Opportunity Zones**, **Disaster Preparedness and Economic Resilience**. Finally, the **Evaluation Framework** describes how to measure the results and impact of this strategy moving forward.

Overview of Strategic Findings in Report

By all accounts, the region is on the verge of substantial growth, and has many of the necessary ingredients to support successful economic development including:

Talent Supply

- A nationally recognized major private university, Baylor University, three community colleges, Hill College, McLennan Community College, and Navarro College, and two technical colleges, Southern Careers Institute-Waco and Texas State Technical College, provide robust opportunities to skill up the local workforce to meet future employer need as the region transitions and diversifies into new industries.
- Several partnerships to train local talent in fields such as aerospace manufacturing, industrial systems, and electric vehicle maintenance are available
 - Texas State Technical College offers an industrial systems training program
 - Tesla² will create talent pipeline through a partnership with Texas State Technical College
 - The University Center at McLennan Community College in Waco³ allows local students to pursue undergraduate and graduate degrees from Texas Tech University, Tarleton State University, Midwestern State University, The University of Texas Medical Branch.
 - Baylor Research and Innovation Collaborative⁴ created a high technology research, workforce development/training and industry solutions center.

Economic Diversity

- The Heart of Texas region was heavily dependent on jobs and revenue from coal, oil, and gas but with the exodus of Big Brown Coal Plant and Manitou Group, the region is in transition, welcoming a diverse group of employers spanning a wide variety of industries ranging from agriculture to manufacturing and production facilities, warehousing, distribution, logistics and supply chain, renewable energy, hospitality, office and retail.

Retail and Entertainment Centers

- Magnolia Market at the Silos⁵ will be a large entertainment and dining center.
- 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf and a bowling center.⁶
- Brazos Riverfront,⁷ an active mixed-use waterfront district along the Brazos River in downtown Waco, Texas and adjacent to Baylor University.

Warehousing/Distribution

- The introduction of Amazon Fulfillment Center⁸
- Holt Cat⁹ is the largest distributor of Caterpillar equipment
- Ryonet Corporation,¹⁰ a screen printing supply distributor

Manufacturing and Production Companies are Flocking to the Region

- There are more than 30 aviation and aviation-related companies that manufacture aircraft, components and materials in the greater Waco region.
- Hello Bello's¹² Diaper manufacturing and distribution company
- Merrick Engineering,¹³ a leading manufacturer of plastic and injection molded consumer product
- Envases Group,¹⁴ a Mexico-based global leader in the production of packaging solutions
- ZinkPower,¹⁵ leader in hot-dip galvanizing and powder-coating services
- Aspen Custom Trailers, a high-end custom commercial trailer manufacturer
- Laminate Technologies,¹⁷ a laminate panel and fabrication manufacturer
- Advanced Rail Systems,¹⁸ leaders in railway automation
- The Coca-Cola Company,¹⁹ a national manufacturing company

Healthcare

- New Era Partners,²⁰ a Behavioral Health Hospital network

Renewable Energy

- New wind and solar farms are being built in the region.

Because the Heart of Texas region is centrally located in Texas, with easy access Austin, Dallas, Houston, and San Antonio, it can very easily diversify its economy by attracting manufacturing and production facilities and becoming a hub for warehouse, distribution, logistics and supply centers.

Environmental Resources

- The Heart of Texas region has an abundant source of renewable energy from solar and wind farms. After the closure of Big Brown Coal plant and the exodus of Manitou Group, the region is seeking to transition from fossil fuels to renewable energy sources. There is land to build these farms, and the result will be a smaller carbon footprint and better air quality for the residents. Additionally, tax revenue will help fund schools in the region, creating a better quality of life for growing families in the region. New farms include:

• Wind

- Engie, in Limestone and McLennan²¹
- Prairie Hill Wind Farm project²² in McLennan and Limestone

• Solar

- Cypress Creek Renewables in Robinson²³
- Hecate Energy LLC in Falls²⁴
- Eddy II in Bruceville-Eddy²⁵
- OCI Solar Power in Falls²⁶
- Glory Leasing in McLennan and Bosque²²⁷

Business Attraction

- With the closure of Big Brown Coal plant, jobs and tax revenue were lost, but the region is showing its resilience by attracting manufacturing and production facilities, warehouse, distribution, logistics and supply centers, and renewable energy into the region, replacing jobs, diversifying its economic base, and supplementing tax revenue.
- There are more than 30 aviation and aviation-related companies that manufacture aircraft, components and materials in the greater Waco region.²⁸

Warehousing/Distribution:

- The introduction of Amazon Fulfillment Center²⁹ will create 1,000 jobs paying \$15 an hour, and is a good step toward economic recovery.
 - It will also put Heart of Texas on the map as a distribution and logistics hub.
- Holt Cat³⁰ is the largest distributor of Caterpillar equipment and will provide 100 jobs.
- Ryonet Corporation,³¹ a screen printing supply distributor, will employ 10 people with plans for growth.

Manufacturing and Production companies are flocking to the region

- Hello Bello's³² Diaper manufacturing and distribution company will create 110 jobs.
- Merrick Engineering,³³ a leading manufacturer of plastic and injection molded consumer product, will create 20 jobs.
- Envases Group,³⁴ a Mexico-based global leader in the production of packaging solutions, will create 120 jobs.
- ZinkPower,³⁵ leader in hot-dip galvanizing and powder-coating services, will create 100 jobs.
- Aspen Custom Trailers,³⁶ a high-end custom commercial trailer manufacturer, will add 70 new highly skilled jobs.
- Laminate Technologies,³⁷ a laminate panel and fabrication manufacturer, will create 40 jobs.
- Advanced Rail Systems, leaders in railway automation, will create 69 new high-skilled jobs.³⁸
- The Coca-Cola Company,³⁹ a national manufacturing company, will expand their facility, retaining 350 jobs and creating 20 new jobs.

Healthcare

- New Era Partners,⁴⁰ a Behavioral Health Hospital network, will create 90 jobs

Renewable Energy

- Introduction of wind and solar farms to the region, providing tax revenue
- Its location in central Texas on both I-35 and I-45, and US Highway 84, is within easy driving distance of four of the fastest growing metropolitan areas in the country, access to Union Pacific line-haul rail and Port of Houston make it an excellent logistical distribution and supply center.
- An abundant and available workforce with relatively low labor and land costs make an attractive case for companies to relocate to this region.

Quality of Life

- Its location, as well as its climate and geography, enhance the cultural, recreation, tourism, and travel opportunities for residents and visitors alike.⁴¹
 - Outdoor recreation among the hills and cliffs of Cameron Park along the Brazos River
 - The Cameron Park Zoo
 - The new McLane Stadium, home to Baylor University's resurgent football program
 - Museums, including the Dr Pepper Museum, the Texas Sports Hall of Fame, the Texas Ranger Hall of Fame and Museum, the Waco Mammoth Site, and Baylor University's Mayborn Museum and Armstrong Browning Library.
 - Magnolia Market at the Silos will be a large entertainment and dining center that will attract visitors and tourists from all over the United States
 - The 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center⁴²
- Brazos Riverfront, an active mixed-use waterfront district along the Brazos River in downtown Waco
- Abundant water, clean air and natural resources create a healthy environment for residents.
- Two major hospitals as well as a wide array of specialists and specialized treatment facilities create a medical epicenter for the Heart of Texas region.
- A strong collaborative network of foundations, nonprofit organizations and churches unite to aid residents in need, particularly during the difficult times onset by the COVID-19 pandemic.
- The region offers important quality of life attributes like good schools, safe neighborhoods and competitively priced housing.

About the Planning Organization

The Heart of Texas Economic Development District (HOTEDD) is designated as an Economic Development District (EDD) by the U.S. Department of Commerce, Economic Development Administration (EDA). Current members of the EDD are Bosque, Falls, Freestone, Hill, Limestone and McLennan Counties.

The EDA provides financial assistance to designated districts in part for the purpose of developing a Comprehensive Economic Development Strategy (CEDS), the region's economic guidebook to diversify and strengthen the regional economy.

As a designated Economic Development District, HOTEDD is responsible for preparing and adopting a CEDS document at least every five years. The CEDS planning process is performed by the HOTEDD CEDS Committee. HOTEDD provides the organizational structure for the formulation of the CEDS and serves as a regional coordinating body. The Heart of Texas Economic Development District Comprehensive Economic Development Strategy is approved and adopted by the HOTEDD Board of Directors which also serves as the HOTEDD CEDS Committee.

The purpose of the CEDS is multi-faceted:

- The CEDS is designed to provide baseline information on demographics and economic data, economic development strategies and implementations plans and identify potential projects within the region.
- Preparation and adoption of the CEDS maintains both the region's EDD designation and grant eligibility for those participating units of government. Entities interested in applying for project grants under the EDA's Public Works and Economic Adjustment Programs must demonstrate how the investment fits into the regional CEDS.

The CEDS is a working document used by both the public and private sectors to provide leadership with a current picture of the economic state and trajectory of the region.



Summary Background

Demographic and Socioeconomic Data

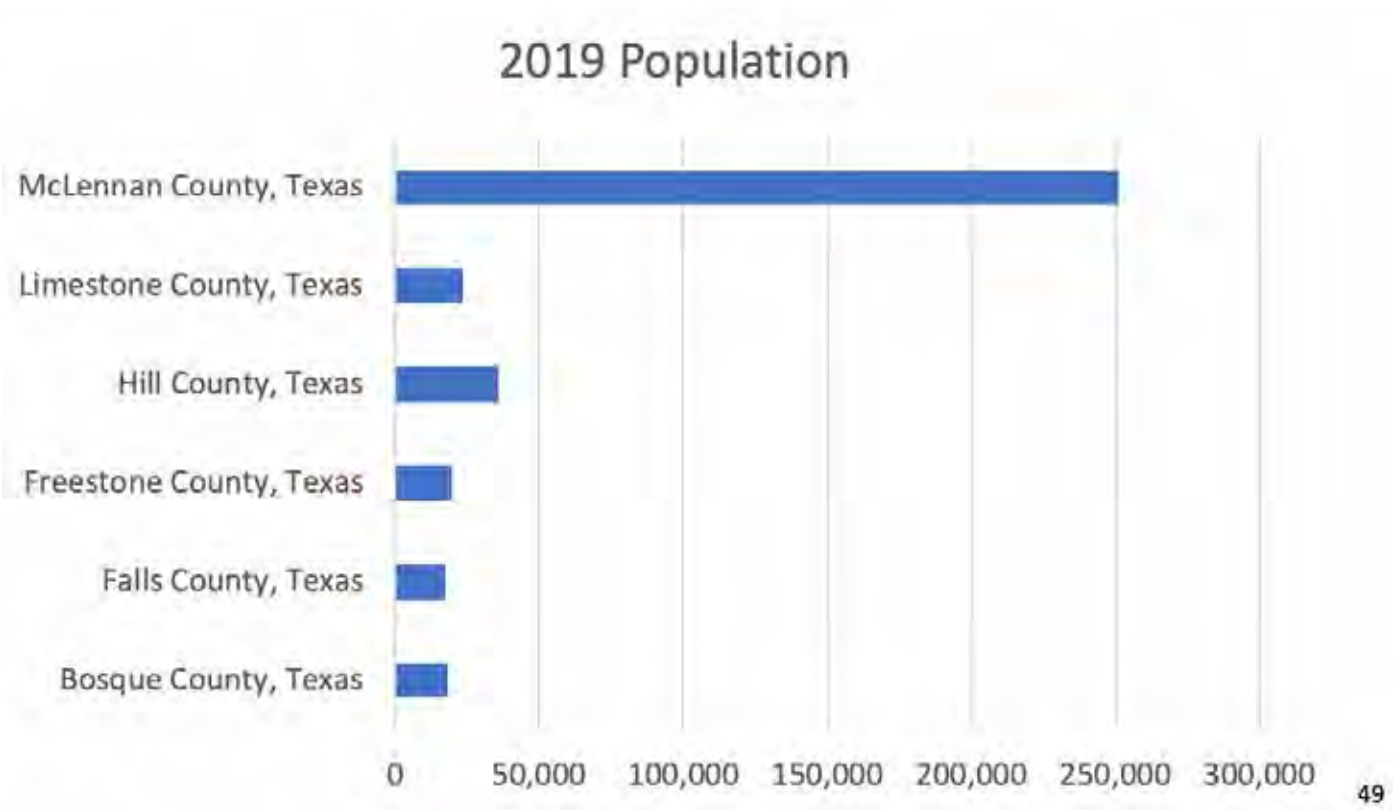
Population

• The Heart of Texas region’s population as a whole is growing, albeit not as fast as the State of Texas, seeing population declines in all counties except McLennan.

The Heart of Texas region had an estimated population of 366,511⁴³ in 2020,⁴⁴ up from 349,273 in 2010⁴⁵ which is an **increase of 16,204 (+4.6%) over a ten-year period**. During the same time period, the State’s population changed by 4,532,107 residents from 25,145,561 to an estimated 29,677,668 persons, or an **18% increase**.

The Texas State Demographers Office predicts that population growth in the Heart of Texas region will continue at a higher rate through 2050. (+6.6%),⁴⁶ although all of this **growth will be consolidated to McLennan County** unless economic development initiatives are successful in attracting people and investment to the other five counties.⁴⁷

The State of Texas is expected to grow from 29,677,668 in 2020 to 47,342,105 in 2050, at a whopping 59.5% increase. This is significantly faster than the rate of growth in the U.S. for the same time period (16.9%).⁴⁸ Growth in the state overall creates opportunities for the Heart of Texas region to attract additional workforce.

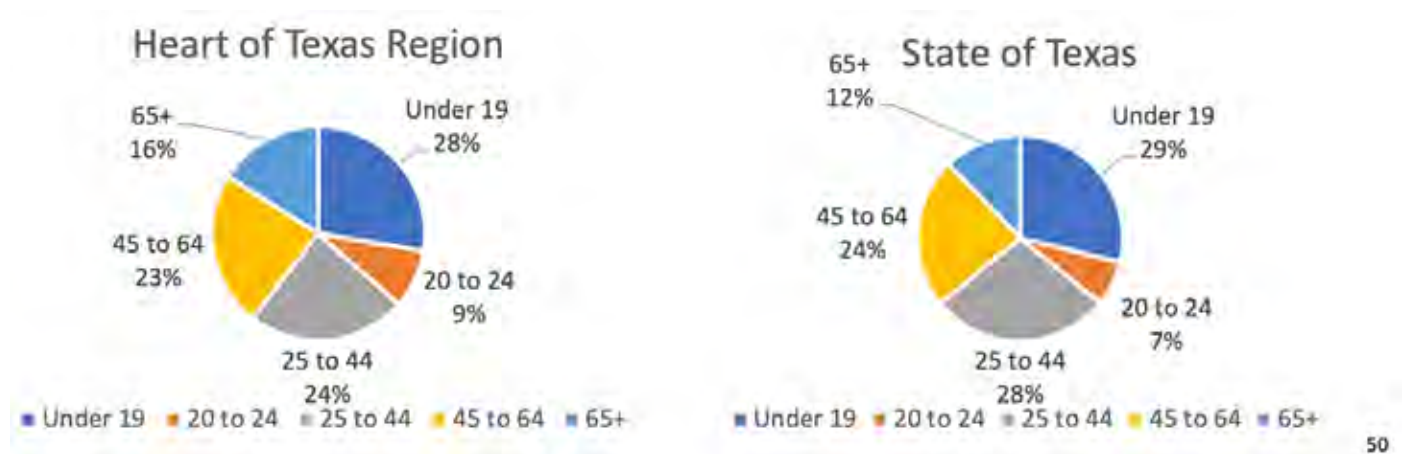


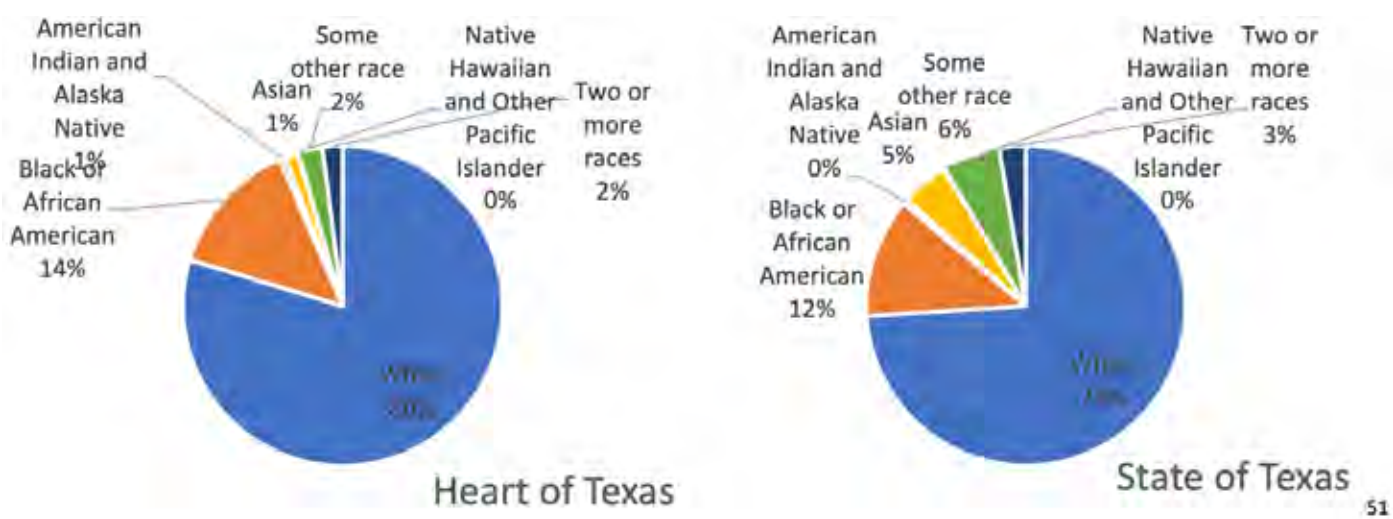
Number and Percent Population Change by County, Region, State, and Country

	2010	2020	2030	2040	2050	2020-2050 # Change	2020-2050 % Change
Bosque	18,212	17,765	17,011	15,635	14,415	(3,350)	-18.9%
Falls	17,866	16,603	15,663	14,748	13,845	(2,758)	-16.6%
Freestone	19,816	19,860	19,555	18,715	17,817	(2,043)	-10.3%
Hill	35,089	35,673	35,119	33,511	31,809	(3,864)	-10.8%
Limestone	23,384	23,544	23,243	22,255	21,240	(2,304)	-9.8%
McLennan	234,906	253,066	269,381	281,304	289,847	36,781	14.5%
Heart of Texas	349,273	366,511	380,035	386,168	388,973	22,462	6.1%
Texas	25,145,561	29,677,668	34,894,452	40,686,496	47,342,105	17,664,437	59.5%
US		332,639,000	355,101,000	373,528,000	388,922,000	56,283,000	16.9%

Age, Race/Ethnicity, Sex, and Special Groups

- More than half the population of the Heart of Texas region is within working age (56%).
- Heart of Texas has a slightly older population than the state as a whole (16% 65+ vs. 12% 65+).
- The Heart of Texas region is not particularly diverse, showing a higher percentage of White (+6pp) and Black (+2pp) individuals, and fewer individuals of other races, compared to the state of Texas. A workforce attraction strategy that includes minority outreach could provide the region with additional growth opportunities.





- Of the area’s population, 49.3% are male and 50.7% are female, comparable to the statewide percentage of 49.7% male and 50.3% female.

Sex Distribution by County, Region, and State

Area	Population 2020	Male Count	Male Percent	Female	Female Percent
Bosque County	17,765	8,678	48.8%	9,087	51.2%
Falls County	16,603	7,905	47.6%	8,698	52.4%
Freestone County	19,860	10,364	52.2%	9,496	47.8%
Hill County	35,673	17,673	49.5%	18,000	50.5%
Limestone County	23,544	12,113	51.4%	11,431	48.6%
McLennan County	253,066	124,023	49.0%	129,043	51.0%
Heart of Texas	366,511	180,756	49.3%	185,755	50.7%
State of Texas	29,677,668	14,740,035	49.7%	14,937,633	50.3%



- Older workers
 - The population cohort **45 and over is higher than the State average** (39% vs. 36%), suggesting a **stable, mature population** comprised of mainly “empty-nesters,” retirees and the aged.⁵²
- 65+
 - There are more individuals in this region who are 65+ compared to the state of Texas (16% vs. 12%), indicating a **need for older worker programs**.⁵³
- Ages 25-44
 - The 25-44 age cohort is lower than the State average (24% vs. 28%), but still close, indicating a healthy economic situation since this group contains the greatest share of the labor force. Decreases over time in this group, especially when similar changes are not occurring statewide, can be an indication that people are moving out of an area they consider to be a poor labor market.⁵⁴
- 18+
 - According to the Texas Demographic Center, 277,121 individuals, or 75.6% of the regional population are over 18, on par with the State of Texas at 22,162,539, or 74.7%.⁵⁵
- Veterans⁵⁶
 - According to the Census Bureau, of the total civilian population in the Heart of Texas region in 2019, 8% were veterans, compared to 7% for the State of Texas as a whole. Hill County has the highest percentage with 9.7% and Freestone has the lowest with 7.5%.

Geographic Area Name	Civilian population 18 years and over	Veterans	Veteran Percent	Nonveterans
Texas	20,829,050	1,453,450	7.0%	19,375,600
Bosque County, Texas	14,396	1,198	8.3%	13,198
Falls County, Texas	13,590	1,188	8.7%	12,402
Freestone County, Texas	15,196	1,145	7.5%	14,051
Hill County, Texas	27,368	2,662	9.7%	24,706
Limestone County, Texas	18,143	1,517	8.4%	16,626
McLennan County, Texas	188,749	14,555	7.7%	174,194
Heart of Texas	277,442	22,265	8.0%	255,177

- Disability Status⁵⁷
 - According to the Census Bureau, 12.7% of Americans have a disability, compared to 11.5% in the state of Texas.
 - Data were unavailable for all counties except McLennan County which reported:
 - 33,935 individuals, or 13.4% with a disability
 - Of those with a disability, 13.9% were ages 5-17, and 86.1% were over the age of 18.

County Migration⁵⁸

- Two counties saw a population decrease from 2010-2020:
 - Bosque (-2.45%) and Falls (-7.07%)
- Freestone, Hill and Limestone saw population remain fairly stagnant over the last decade.
- **McLennan** was the **only county to see an increase** in population (+7.73%).
- **Bosque and Hill counties saw more deaths than births**, which will aid population loss in those areas.

Population Estimates⁵⁹

	2010	2020	Numerical Change	Percent Change
Bosque	18,212	17,765	(447)	-2.45%
Falls	17,866	16,603	(1,263)	-7.07%
Freestone	19,816	19,860	44	0.22%
Hill	35,086	35,673	587	1.67%
Limestone	23,384	23,544	160	0.68%
McLennan	234,906	253,066	18,160	7.73%

“Retaining and attracting new residents is vital to the economic success of rural communities. **Population loss** translates into **fewer customers and workers for local businesses and a diminishing tax base** for public services” such as infrastructure and public schools, assets that may help attract businesses and workers.⁶⁰

According to William H. Frey, a demographer with the Brookings Institution, population decline in areas could be due to **fewer economic prospects compared with other areas in the region or state**. These fewer prospects are less likely to attract migrants from elsewhere in the state, other states, and especially abroad.⁶¹

A few strategies to attract new residents or retain existing ones are:⁶²

- Create “a dynamic, growing job market” to attract new people in search of work. Studies have shown “that rural counties with higher salaries and job growth were especially effective in attracting workers from urban areas, with local economic conditions having a larger effect for short distance moves. Natural amenities — think scenic landscapes and pleasant climates — matter more in remote rural places for attracting urban residents.”
- Attract retirees. “Retirees are pulled by a pleasing climate, such as mild winter temperatures and beautiful views.” Access to health care services, which Heart of Texas has, are particularly attractive for this cohort.
- Connect with high schools and local businesses for vocational training, to counter the perception that there is no opportunity for jobs in their hometown, and to combat the loss of college-bound youth.



Vital Statistics

- According to the Texas Department of State Health Services⁶³ for vital statistics for the year 2015, the Heart of Texas region had a total of 4,833 live births which represents a live birth rate of 13.5 births for every 1,000 persons, compared to a statewide rate of 14.8 births per 1,000 persons in the population. The Heart of Texas region had a total of 3,472 deaths,⁶⁴ representing a rate of 9.7 for every 1,000 persons compared to a statewide rate of 6.9.
- Bosque and Hill counties saw more deaths than births**, which will aid population loss in those areas.

	2015 Population	2015 Births	2015 Deaths
Texas	27,326,193	403,439	189,166
Bosque	17,952	186	224
Falls	17,223	207	178
Freestone	19,847	215	202
Hill	35,475	389	455
Limestone	23,481	308	290
McLennan	243,882	3,528	2,123
Heart of Texas	357,860	4,833	3,472

Workforce, Employment and Unemployment

Civilian Labor Force:

- The labor force has increased in Heart of Texas** (mostly from McLennan County) but decreased in Texas from October 2019-2020.
- Unemployment has increased likely due to residual effect of COVID-19 and the closure of Big Brown Coal Plant and exit of Manitou Group.
 - Oil and gas pipeline construction appears in the top five unemployment claims** in four of the six counties.⁶⁵
- Limestone County is experiencing an unemployment rate on par with the State of Texas, while other counties and the region as a whole are seeing lower rates.

The most recent civilian labor force estimates from The Bureau of Labor Statistics for Texas in October 2020 is 14,084,000, a slight decrease (-76,862) from October 2019's 14,160,862.⁶⁶ The Heart of Texas region had a civilian labor force of 168,742 in October 2020, a 2,344 increase from October 2019.⁶⁷

- An **indicator of a thriving workforce is that the civilian labor force in Heart of Texas has increased** despite a statewide decrease.

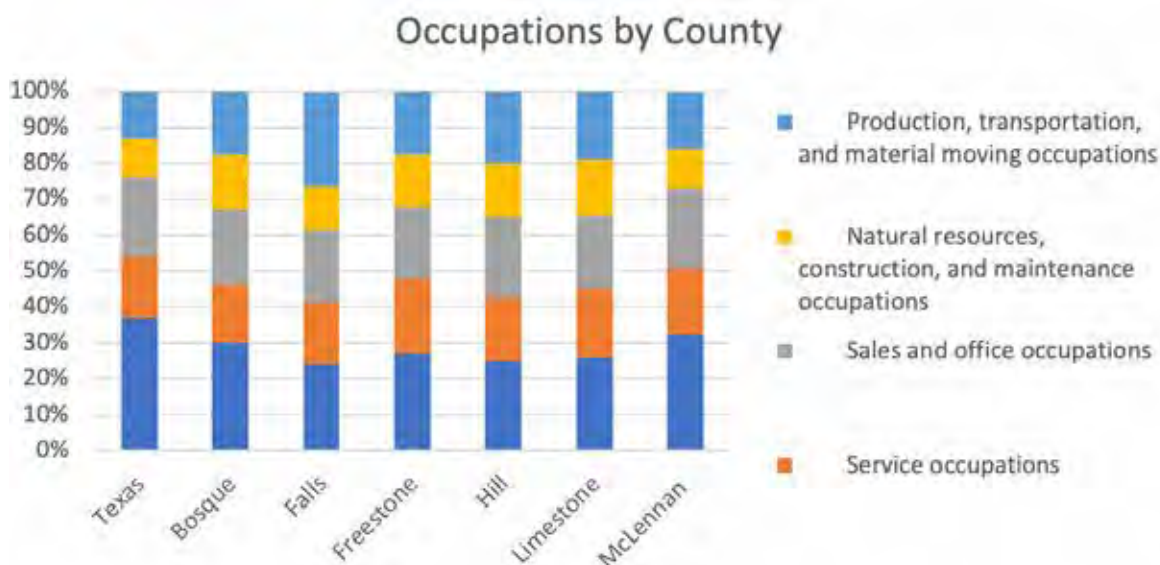
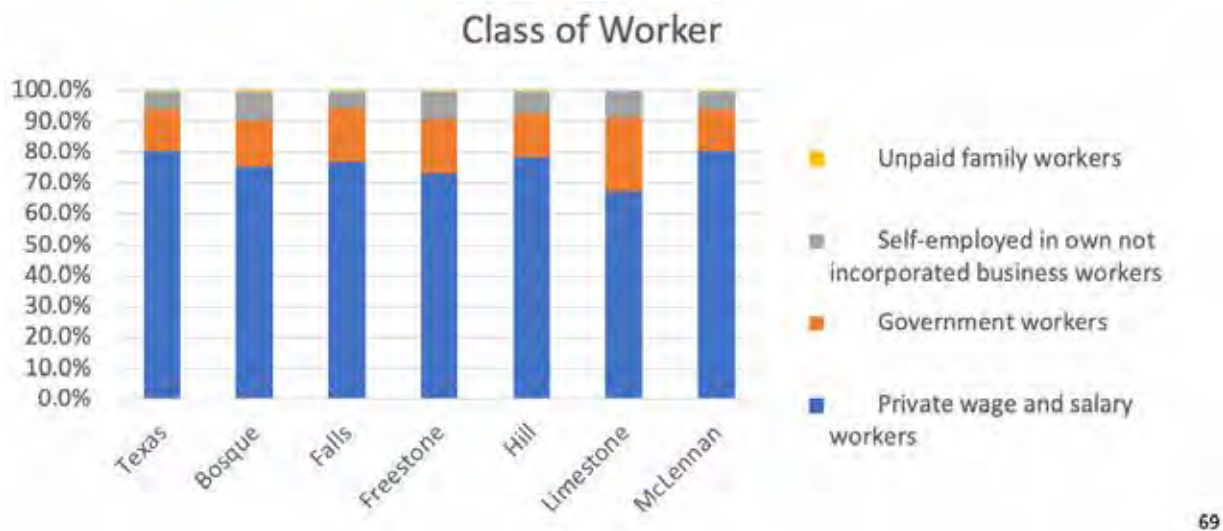
	Empl Oct 2020 ⁶⁸	Empl Oct 2019	Labor Force Oct 2020	Labor Force Oct 2019	Unemp Oct 2020	Unemp Oct 2020	Unemp Oct 2019	Unemp Oct 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862	968,200	6.9	497,108	3.5
Bosque	7,872	8,101	8,260	8,374	388	4.7	273	3.3
Falls	6,378	6,413	6,737	6,619	359	5.3	206	3.1

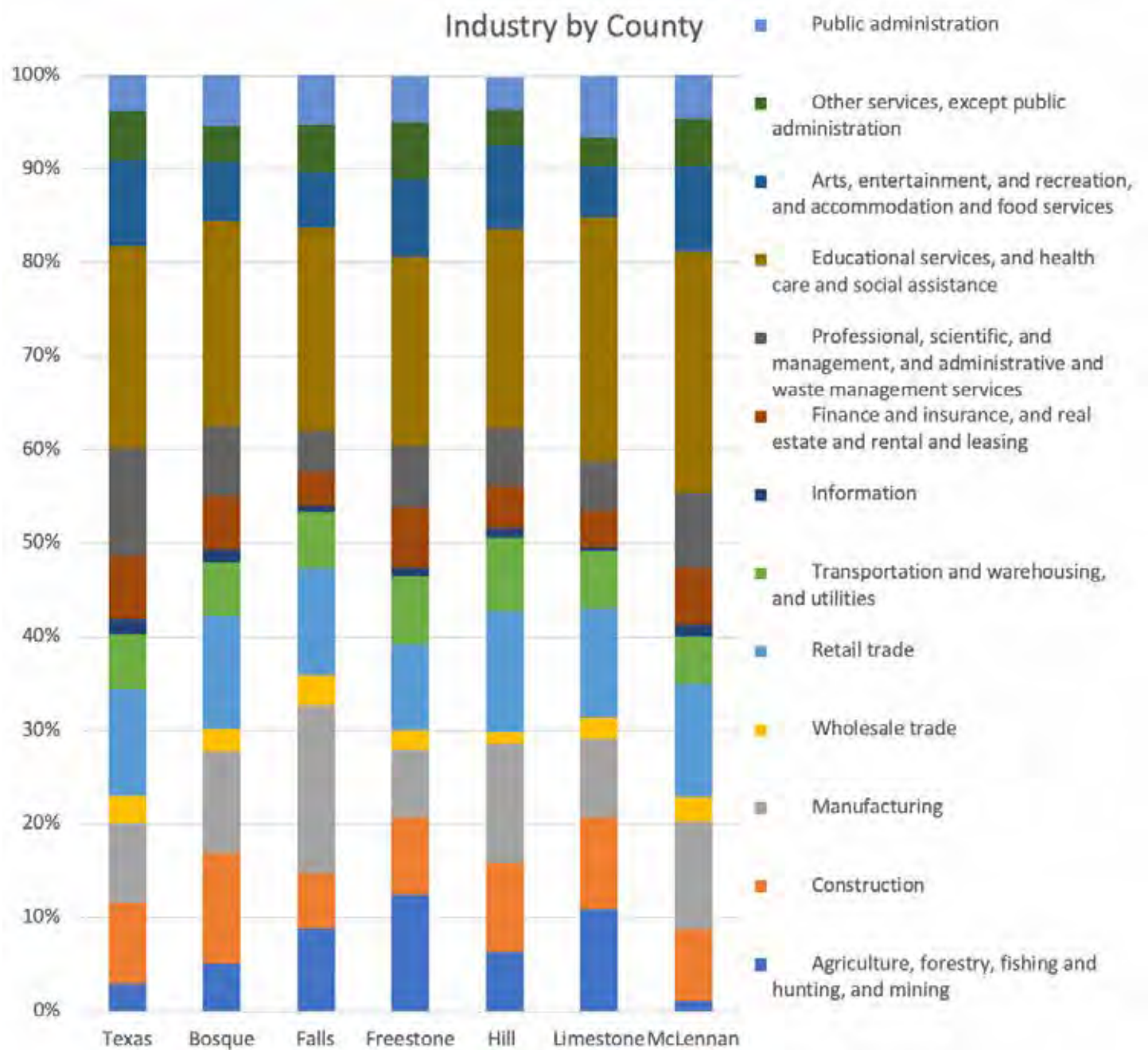
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Freestone	5,774	6,119	6,264	6,424	490	7.8	305	4.7
Hill	15,548	16,064	16,457	16,548	909	5.5	520	3.1
Limestone	8,090	8,331	8,685	8,649	595	6.9	318	3.7
McLennan	115,765	116,007	122,339	119,784	6,574	5.4	3,777	3.2
Heart of Texas	159,427	161,035	168,742	166,398	9,315	5.5%	5,399	3.2%

• According to the Bureau of Census/American Community Survey (ACS) estimates, the area had:

- 125,895 or 78.8% private wage and salary workers (vs. 80.1% Statewide)
- 23,077, or 14.4% government workers (vs. 13% Statewide)
- 10,385, or 6.5% were self-employed, (vs. 6.7% Statewide)
- 439 were unpaid family workers representing 0.3% (vs. 0.2% Statewide)





Quarterly Workforce Indicators

- Employment numbers increased QoQ for 2019, however saw a slight dip during the first quarter of 2020, likely due to the onset of COVID-19.
- There were **more hires than separations**, indicating a healthy workforce.



Quarterly Workforce Indicators for the Region⁷²

	Q1 19	Q2 19	Q3 19	Q4 19	Q1 20
Employment	136,750	138,394	138,507	139,081	137,293
Hires	23,475	27,728	28,966	25,401	23,531
Separations	22,494	26,818	28,379	24,785	N/A
Turnovers	0.093	0.093	0.089	N/A	N/A
Avg Monthly Earnings	4,029	4,033	4,101	4,316	N/A

Quarterly Workforce Indicators for the State⁷³

	Q1 19	Q2 19	Q3 19	Q4 19	Q1 20
Employment	12,145,170	12,333,679	12,347,495	12,514,766	12,405,964
Hires	2,086,759	2,466,007	2,516,089	2,411,133	2,079,388
Separations	1,997,460	2,308,885	2,479,696	2,283,806	N/A
Turnovers	0.098	0.097	0.095	N/A	N/A
Avg Monthly Earnings	5,443	4,978	5,010	5,342	N/A

Income:⁷⁴

- Median household income is lower than Texas in all 6 counties, indicating an **economically depressed region**.
- Hill County has the highest median income, while Falls County sees the lowest median income.

	Texas	Bosque	Falls	Freestone	Hill	Limestone	McLennan
Median household income (dollars)	\$61,874	\$52,148	\$39,497	\$49,471	\$53,307	\$44,418	\$49,778

Economic Stress Criteria⁷⁵

- For the region as a whole, unemployment is one percentage point below the U.S. rate, however,
- 2019 Per Capita Money Income is **\$25,229, or 74%** of the U.S. amount of \$34,103
- 2019 Per Capita Personal Income is **\$41,272, or 73%** of the U.S. amount of \$56,490
 - **Falls County** sees the lowest Per Capita Personal Income at **\$35,258, or 62.4%** of the U.S. rate
 - **Bosque County** sees the highest Per Capita Personal Income at **\$42,366 or 75%** of the U.S. rate



Economic Distress Criteria–Primary Elements

	Heart of Texas	U.S.	Threshold Calculations
24-month Average Unemployment Rate (BLS) period ending October 2020	4.6	5.61	-1.01
2019 Per Capita Money Income (5-year ACS)	\$25,229	\$34,103	73.98%
2019 Per Capita Personal Income (BEA)	\$41,272	\$56,490	73.06%

Economic Distress Criteria–Geographic Components

	24 Month Unemp	Threshold Calculation	2019 Per Capita Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

Hires⁷⁶

- New hires represent workers at a business who were not working at that same business in the previous quarter. These data answer the question of which industries are doing the most hiring. The data does not say anything about job quality, simply hiring activity. New hires as a percent of total employment points to the employment volatility of an industry. Although a high percentage of new hires could indicate rapid hiring activity typically higher numbers represent more volatile, high turnover industries.
 - Accommodation and Food Services hired the most new employees; however, this industry is typically volatile.
- These five industries employ the most individuals in the region. Heart of Texas should focus on increasing their manufacturing facilities, utilizing industrial parks and partnering with renewable energy farms to supply resources.
 - Health Care and Social Assistance
 - Educational Services
 - Manufacturing
 - Retail Trade
 - Accommodation and Food Services
- Mining, Quarrying, and Oil and Gas Extraction saw no hires in Q1 2020, likely due to the closure of Big Brown Coal Plant and the decline of oil and gas as renewable energy becomes more mainstream.

Top Industries hiring in Q1 2020	New Hires Q1 2020	Employment Q1 2020	Hires as % of Employment
Accommodation and Food Services	4,450	12,927	34%
Administrative and Support and Waste Management and Remediation Services	3,518	9,226	38%
Health Care and Social Assistance	2,716	19,935	14%
Retail Trade	2,547	14,661	17%
Manufacturing	2,368	17,578	13%
Construction	2,058	9,302	22%
Educational Services	1,271	18,331	7%
Professional, Scientific, and Technical Services	1,098	4,324	25%
Wholesale Trade	617	6,082	10%
Other Services (except Public Administration)	579	3,210	18%
Transportation and Warehousing	475	3,069	15%
Real Estate and Rental and Leasing	418	N/A	N/A
Public Administration	345	5,189	7%
Finance and Insurance	317	5,123	6%
Agriculture, Forestry, Fishing and Hunting	97	610	16%
Mining, Quarrying, and Oil and Gas Extraction	None	0	N/A
Utilities	None	1201	N/A

Occupation Groups by Employment

- The total number of persons 16 years of age or older who were employed in Heart of Texas in 2019 was 159,796. The following presents a table of those employed by occupational categories for this region compared to statewide percentages.
- The industries that employ the most people in the region are
 - Education
 - Retail Trade
 - Manufacturing



Industry	Texas		Heart of Texas	
	Estimate	Percent	Estimate	Percent
Civilian employed population 16 years and over	13,253,631	100.0%	159,796	100.0%
Educational services, and health care and social assistance	2,863,828	21.6%	39,477	24.7%
Retail trade	1,507,002	11.4%	19,198	12.0%
Manufacturing	1,125,176	8.5%	18,342	11.5%
Arts, entertainment, and recreation, and accommodation and food services	1,216,771	9.2%	13,644	8.5%
Construction	1,137,958	8.6%	13,016	8.1%
Professional, scientific, and management, and administrative and waste management services	1,524,750	11.5%	11,903	7.4%
Finance and insurance, and real estate and rental and leasing	884,408	6.7%	9,081	5.7%
Transportation and warehousing, and utilities	777,044	5.9%	8,893	5.6%
Other services, except public administration	684,780	5.2%	7,882	4.9%
Public administration	528,412	4.0%	7,565	4.7%
Agriculture, forestry, fishing and hunting, and mining	397,032	3.0%	5,070	3.2%
Wholesale trade	378,542	2.9%	3,873	2.4%
Information	227,928	1.7%	1,852	1.2%

Occupation Demand

- Current job postings indicate what roles employers are seeking to fill in real time, rather than job projections, which calculate industry and population changes to predict occupational need. The following chart shows the Top 25 occupations in demand based on aggregate jobs postings for 2020 YTD.
 - Truck Drivers, Heavy and Tractor-Trailer, Combined Food Preparation and Serving Workers, Including Fast Food, Maintenance and Repair Workers, General, Laborers & Freight, Stock & Material Movers, Hand, and Driver/Sales Workers are all skilled jobs that do not require extensive higher education, reflecting the current workforce. This is a good indicator that not only are these jobs in demand, but the workforce is available to fill these roles, which would be a good way to attract future businesses who want to set up manufacturing and production facilities, or warehouse, distribution, logistics and supply centers in the Heart of Texas region.



Top 25 Occupations by Help Wanted Postings⁷⁷

Between January 2020 and November 2020

Rank	SOC	SOC Title	Postings
1	41-1011	First-Line Supervisors/Managers of Retail Sales Work	1,649
2	29-1141	Registered Nurses	1,580
3	41-2031	Retail Salespersons	1,541
4	43-4051	Customer Service Representatives	1,501
5	41-4012	Sales Rep., Wholesale & Manufacturing, Except Tech. & Scientific Products	1,480
6	53-3032	Truck Drivers, Heavy and Tractor-Trailer	1,416
7	5-3021	Combined Food Preparation and Serving Workers, Including Fast Food	960
8	49-9071	Maintenance and Repair Workers, General	886
9	53-7062	Laborers & Freight, Stock & Material Movers, Hand	759
10	53-3031	Driver/Sales Workers	667
11	29-2061	Licensed Practical and Licensed Vocational Nurses	655
12	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	575
13	Nov-51	Food Service Managers	571
14	39-9021	Personal Care Aides	505
15	Nov-99	Managers, All Other	500
16	31-1014	Nursing Assistants	464
17	27-1026	Merchandise Displayers and Window Trimmers	462
18	25-2022	Middle School Teachers, Except Special and Vocation	436
19	43-5081	Stock Clerks and Order Fillers	434
20	37-2012	Maids and Housekeeping Cleaners	427
21	33-9032	Security Guards	414
22	43-6014	Secretaries & Administrative Assistants, Except Legal, Medical, & Executive	387
23	11-1021	General and Operations Managers	379
24	41-2011	Cashiers	370
25	35-2014	Cooks, Restaurant	359



Occupational Projections:⁷⁸

- The following chart shows the occupations projected to grow by the most number of jobs by 2028. Because projections calculate industry and population changes to predict occupational need, this will change dependent on Heart of Texas's ability to attract new industries to the region that create new jobs, including in manufacturing and production, warehouse, distribution, logistics and supply centers.

SOC Code	Occupation Title	Estimated Employment (2018)	Projected Employment (2028)	Change in Employment	Percentage Change
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	1,047	1,310	263	25.12
35-2014	Cooks, Restaurant	869	1,083	214	24.63
47-2061	Construction Laborers	766	971	205	26.76
39-9021	Personal Care Aides	384	578	194	50.52
47-2061	Construction Laborers	449	631	182	40.53
21-2011	Clergy	1,410	1,588	178	12.62
35-3031	Waiters and Waitresses	1,731	1,865	134	7.74
37-3011	Landscaping and Groundskeeping Workers	379	501	122	32.19
43-6013	Medical Secretaries	506	619	113	22.33
29-1141	Registered Nurses	358	468	110	30.73
25-2031	Secondary School Teachers, Except Special and Career/ Technical Education	1,463	1,567	104	7.11
25-2021	Elementary School Teachers, Except Special Ed.	1,479	1,581	102	6.9
31-9092	Medical Assistants	343	439	96	27.99
29-2061	Licensed Practical and Licensed Vocational Nurses	309	390	81	26.21
25-9041	Teacher Assistants	1,203	1,283	80	6.65
53-3022	Bus Drivers, School or Special Client	313	393	80	25.56
25-2022	Middle School Teachers, Except Special and Career/ Technical Education	983	1,054	71	7.22
33-3051	Police and Sheriff's Patrol Officers	732	803	71	9.7
29-1123	Physical Therapists	190	261	71	37.37
39-9011	Childcare Workers	346	414	68	19.65

Establishments:

- The Greater Waco Chamber provides custom reports listing major employers operating in the Heart of Texas region
 - There are more businesses in the Manufacturing Industry that employ the most individuals in the Greater Waco Area than any other industry, indicating that Heart of Texas has a **robust manufacturing workforce**.
 - More than 30 aviation and aviation-related companies that manufacture aircraft, components and materials are operational in the region.⁷⁹

Industry	Count
Manufacturing	49
Education	20
Health Care	17
Retail	15
Logistics	12
Professional Services	12
Construction	11
Financial	9
Local Government	7
Utility	7

* Full list is in the appendix



Major Employers⁸⁰

Company	Industry	Total Employment
Baylor University	Education	3,253
Waco ISD	Education	2,373
H-E-B	Retail	2,000
Baylor Scott & White Medical Center - Hillcrest	Healthcare	1,736
Texas State Technical College Waco	Education	1,706
Ascension Providence	Healthcare	1,622
City of Waco	Local Government	1,518
McLennan County	Local Government	1,201
Sanderson Farms Inc.	Manufacturing	1,200
Wal-Mart	Retail	1,174
Midway ISD	Education	1,081
Veterans Administration Medical Center	Healthcare	886
Examination Management Services, Inc. (EMSI)	Professional Services	824
Veterans Affairs Regional Office	Federal Government	796
AbbVie	Manufacturing	785
L3Harris	Aerospace	774
McLennan Community College	Education	719
Mars Wrigley Confectionery	Manufacturing	700
Aramark	Professional Services	696
American Income Life	Insurance	693

Industries

Employment by major industry for Region, State, and Nation

- When employment changes at a higher rate than the State, there may be comparative advantages in the local economy which are driving these changes. Conversely, when change is at a lower rate, then the Super Sector is showing less change in comparison to the State and may consequently have a smaller comparative change impact.
- Comparing Q2 2019 to 2020, **all industries saw a decline in the State of Texas, however, in Heart of Texas, Construction, Manufacturing, Professional Business, and Public Administration saw growth**, indicating promising target industry sectors in the region.
- Natural resources and mining saw a decline due to the closure of Big Brown Coal Plant and the decline of oil and gas in the region.

Employment by Industry (2nd Quarter 2020, 2019)⁸¹

Heart of Texas

Industry	Q2 2019 Employment	Q2 2020 Employment	Employment Change	Percent Change
Natural Resources and Mining	2,261	1,842	(419)	-18.53%
Construction	9,461	9,591	130	1.37%
Manufacturing	16,994	17,128	134	0.79%
Trade, Transportation and Utilities	27,032	25,937	(1,095)	-4.05%
Information	1,192	1,042	(150)	-12.58%
Financial Activities	7,822	7,193	(629)	-8.04%
Professional and Business Services	13,343	13,790	447	3.35%
Education and Health Services	39,125	37,372	(1,753)	-4.48%
Leisure and Hospitality	15,522	12,421	(3,101)	-19.98%
Other Services	3,253	2,966	(287)	-8.82%
Public Administration	6,579	6,794	215	3.27%

Texas

Industry	Q2 2019 Employment	Q2 2020 Employment	Employment Change	Percent Change
Natural Resources and Mining	311,677	247,672	(64,005)	-20.5%
Construction	806,541	761,406	(45,135)	-5.6%
Manufacturing	908,725	858,552	(50,173)	-5.5%
Trade, Transportation and Utilities	2,570,925	2,444,585	(126,340)	-4.9%
Information	217,547	199,153	(18,394)	-8.5%
Financial Activities	778,747	772,066	(6,681)	-0.9%
Professional and Business Services	1,796,512	1,701,797	(94,715)	-5.3%
Education and Health Services	2,922,817	2,790,442	(132,375)	-4.5%
Leisure and Hospitality	1,437,194	1,030,807	(406,387)	-28.3%
Other Services	347,154	282,652	(64,502)	-18.6%
Public Administration	461,739	467,500	5,761	1.2%



Manufacturing:

- **Manufacturing is proving to be a prominent industry in the region.** The top Manufacturing employers are below:

Major Employers⁸²

Rank	Company	Industry	Total Employment
9	Sanderson Farms Inc.	Manufacturing	1,200
15	AbbVie	Manufacturing	785
18	Mars Wrigley Confectionery	Manufacturing	700
22	Texas Materials	Manufacturing	672
23	Cargill Value Added Meats	Manufacturing	646
26	Versalift	Manufacturing	518
29	Howmet Fastening Systems	Manufacturing	490
30	Pilgrims	Manufacturing	480
33	Coca-Cola North America	Manufacturing	440
37	O-I Glass	Manufacturing	385
46	Packaging Corporation of America	Manufacturing	313
51	Lochridge Priest	Manufacturing	264
54	Clayton Homes	Manufacturing	260
57	Fleetwood Homes	Manufacturing	230
70	TYMCO	Manufacturing	177

Environmental, Geographic, Climatic, and Cultural Resources

Environment

The region has shown significant advances in the realm of environmental awareness by its public and economic development agencies. Showcase LEED buildings have been constructed by the Greater Waco Chamber of Commerce and McLennan Community College that boast such features as recycled building materials and green roofs. Solid Waste reduction programs offered by the Heart of Texas Council of Governments have seen strong participation. Of all of the environmental challenges facing the region, air quality has grown as a local issue and will become an even greater priority, especially if the standard for ground-level ozone is lowered from the current level of 75 parts per billion. However, the closure of the Big Brown Coal Plant will positively affect air quality as renewable energy moves into the region.

Solar Energy

As the Texas economy continues to grow, electricity consumption has correspondingly increased. Environmental regulations and various market pressures have forced a significant amount of generation to exit the market in recent years (coal, oil, and gas) while older generation sources continue to be retired. Thus, **new solar generation capacity is required to meet the Texas market's demand.**

Texas ranks 2nd in a national ranking of solar energy adoption and is poised to become a nationwide leader in solar energy, something the Heart of Texas region can leverage to attract more green energy companies. Capacity is expected to increase from 6,751.45 MW in December 2020 to 15,906 MW over the next five years, ranking second in growth projection, with appropriate state policy that removes market barriers and recognizes solar's benefits.⁸³

- Solar farms generate more taxes than farmland.⁸⁴

While Texas has the land and the climate to fuel solar farms, which brings in tax revenue and helps air quality, this industry does not produce significant jobs.

- OCI Solar Power, a new solar farm in Falls county, only plans on **hiring one person at an annual wage of \$48,000** once the project is operational in 2022.⁸⁵

Texas Solar Facts⁸⁶

- **Solar Installed (MW):** 6,751.45
- **National Ranking:** 2nd (2nd in 2019)
- **Enough Solar Installed to Power:** 783,663 homes
- **Percentage of State's Electricity from Solar:** 1.76%
- **Solar Jobs:** 10,261
- **Solar Companies in State:** 475 (80 Manufacturers, 195 Installers/Developers, 200 Others)
- **Total Solar Investment in State:** \$8,628.77 million
- **Prices have fallen** 45% over the last 5 years
- **Growth Projection and Ranking:** 15,906 MW over the next 5 years (ranks 2nd)
- **Number of Installations:** 91,756

Wind Energy:

- Winds in the region average about 7 meters per second at a height of 80 meters, according to a U.S. Department of Energy map.⁸⁷ This indicates a successful climate for gathering wind energy.

Infrastructure Assets

Interstates and Highways

- Access to both I-35 and I-45, and US Highway 84, which makes the region within easy driving distance of four of the fastest growing metropolitan areas in the country.
- Old Mexia-Fairfield road was expanded for **increased commercial and industrial traffic**. The project will help retain and encourage existing business to expand and draw manufacturing and industrial users to the newly completed Industrial Park by providing a roadway facility that can support truck traffic, and improve access to and from Interstate 45, which a vital infrastructure route between Houston and Dallas.
- TxDOT is adding four lanes to each side of I-35, with complete reconstruction to frontage roads, in order to keep up with Waco's growing popularity. The I-35 project is on track to be completed in the next 3 years (2023).⁸⁸

Local Transit

- **Heart of Texas Rural Transit District** offers one way demand response transportation to the general public in Bosque, Falls, Freestone, Hill, and Limestone counties Monday through Friday, for \$1 within county, and \$2 for out of county. Service is provided using a fleet of HOTCOG ADA accessible vans. Clients call to schedule rides to their specific destination with rides based on availability.⁸⁹
- **Waco Transit**,⁹⁰ or WTS, offers single rides to the general public in McLennan county for \$1.50 and unlimited fixed route rides for the duration of the calendar day during normal operating hours, for only \$3.
- WTS is **looking to expand service** as Holt, Amazon, and other companies enter the region.⁹¹
- **FREE Shuttle Service in Downtown**, running every 15-20 minutes, Monday through Saturday, from 9 a.m. to 6:30 p.m. ⁹²

Rail

- Union Pacific Railway⁹³ operates a line-haul route through Bellmead Yard in McLennan County.
- Fairfield, Texas is located:
 - 75 miles south of the UP Dallas Intermodal Terminal in Wilmer, TX.
 - 10 miles from the BNSF Teague Terminal.

Airports

Waco Regional Airport⁹⁴

- Commercial service with American Airlines
- Car rental from Avis, Enterprise, and Hertz
- Baylor University Flight Center,⁹⁵ offers Baylor Aviation Science majors a one-of-a-kind integrated pilot training system that is unique in the world of collegiate aviation, using three different aircraft models from only one manufacturer – Tecnam - in addition to all Tecnam-specific simulators for training purposes.
- General aviation services and manufacturing⁹⁶

McGregor Executive Airport

- Offers general aviation and pilot training opportunities⁹⁷

Texas State Technical College Airport

- Provides an 8,600-foot industrial runway and on-site training⁹⁸

Industrial Parks

Texas Central Park⁹⁹ encompasses 3,000 acres, with 1,200 of them available for development. Located in the intersection at the intersection of I-35, Texas Highway 6, and US Highway 84, the park is served by the Union Pacific main railroad line and is home to 75 companies with over 8,600 employees and over 10 million square feet, including Coca Cola North America, Masterfoods USA, Caterpillar, and Allergan, to name a few.

Robinson Business Park¹⁰⁰ provides more than 600 acres of land at the crucial intersection of Interstate 35 and Highway 6/Loop 340.

The Robinson Business Park is the Waco Industrial Foundation's newest acquisition and is comprised of approximately 175 acres of commercial-zoned land, and more than 460 acres of light industrial land. The property is served with transmission-grade utilities that can serve virtually any demand requirements and is one of the few industrial parks accessing the WMARSS reclaimed/purple pipe water system (20" line).

Plans call for a new roadway that will bisect the Robinson Business Park, granting access onto Interstate 35, Loop 340 and Greig Drive, which serves as the southeastern boundary of the property. Unrecorded covenants have been drafted to ensure a premium quality business park that seamlessly brings together commercial and retail with light industrial and distribution users.

Waco International Aviation Park¹⁰¹ near Texas State Technical College (TSTC) and Interstate 35, is prime property for those in the aviation industry. TSTC is home to an all-weather runway that is 8,600 feet x 150 feet. Because the airport is not utilized by commercial airlines, the airspace is not congested. Over 300 acres of land are available for lease on TSTC airport. Adjacent to the airport is property that is particularly well suited to aircraft manufacturing and assembly. Other acreage is appropriate for aviation supplier networks not needing flight line access. Approximately 700 acres are available for development. The park is currently home to L-3 Integrated Communications, Sanderson Farms, and Dr Pepper Bottling.

Waco Regional Airport Industrial Park¹⁰² is open to all types and sizes of business. The location lends itself naturally to businesses involved in the development or production of aviation-related products and services, and also works well for businesses that are compatible with the restrictions and regulations established by the FAA for land uses near airports. There are prime locations with ramp access connected directly to the airport runways. Businesses not requiring direct access to ramps can be located in either obligated or non-obligated areas of the airport. Non-obligated property can also be considered for sale through the newly created land sale incentive program at Waco Regional. This industrial park is also home to a Foreign Trade Zone to better meet the needs of all aviation, aviation-related, and non-aviation businesses that may locate there.

Fairfield Industrial Park North¹⁰³ is home to 45 acres of quality developed land with the best infrastructure and location that a business could ever want. Located just off Interstate 45 in Fairfield, Texas, our "45 on 45" is home to industry leading companies such as Norwesco manufacturer of proprietary rotationally molded polyethylene tanks for agricultural, water, closed-top industrial and below ground septic and cistern applications), Archrock (natural gas contract compression services), Custom Hose (hydraulic hoses, hydraulic equipment & supplies, air & water hoses, pressure relief valves, oil field equipment & supply and industrial plumbing supplies), Baker Hughes (provider of integrated oilfield products, services and digital solutions), Windstream Communications (network communications and technology solutions) and Chris Christensen Systems (Professional Grooming Products and Tools for dogs).

Fairfield Industrial Park South¹⁰⁴ is now complete and available with 125 acres of shovel ready sites for business development. The new park is located just one-half mile off Interstate 45 allowing for excellent truck transportation access to the site.

Mexia Industrial Park,¹⁰⁵ with access to I-35, I-45, and US 84, has recently invested about 600 acres of land adjacent to the existing Industrial Park. The sites have direct access to State Highway 14 with its connection to Interstate 45 and is located just ½ mile north of US Highway 84, which connects Interstates 45 and 35. Infrastructure is currently in planning to provide full access and amenities to the property. Mexia Industrial Park is currently home to Aggregate Haulers, Carry-On Trailer Manufacturing, Kennedy Auctions, Kioti Tractors, Martin-Marietta Concrete, Navarro College, Rogers Manufacturing, and Texas Department of Health & Human Services.

Proximity to Port of Houston: Fairfield, Texas is approximately 160 miles from Port Houston and is situated in the perfect location on I-45 to benefit as an inbound and outbound location to move, store and assemble products.¹⁰⁶

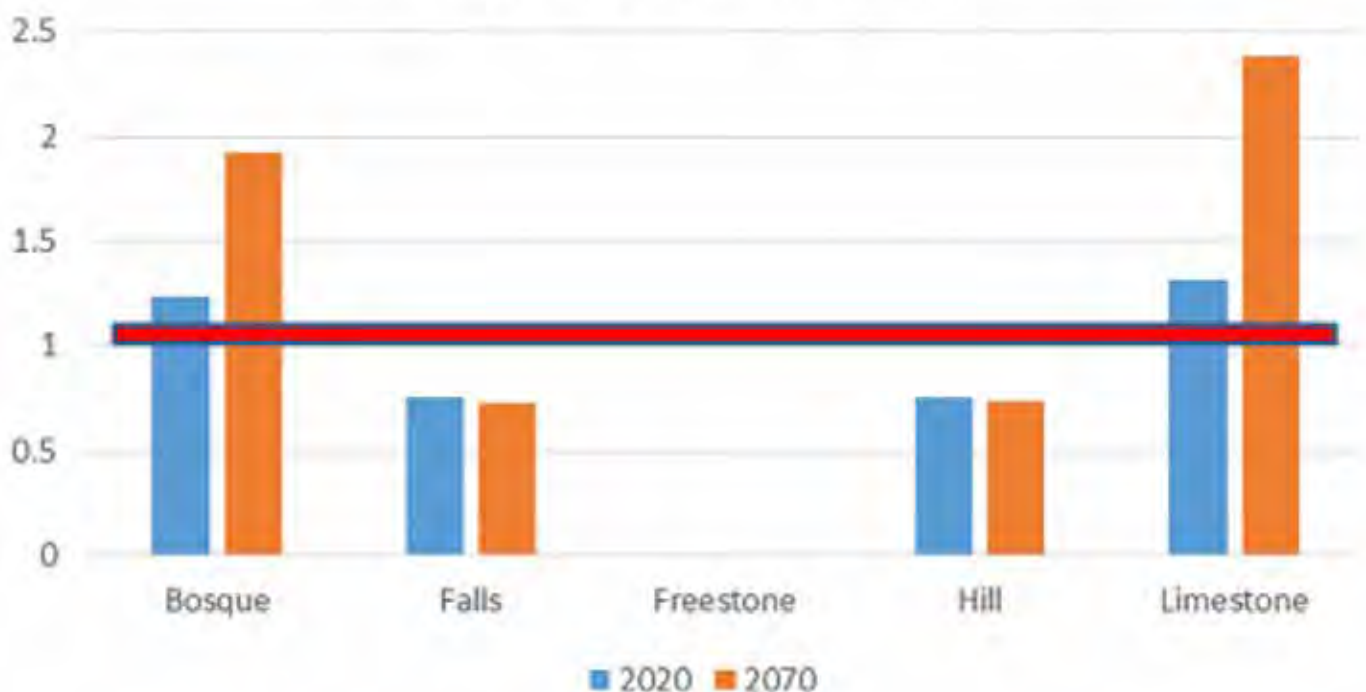
Foreign Trade Zone:¹⁰⁷ U.S. Foreign Trade Zone No. 246 covers over 400 acres in Waco. It is the only foreign trade zone located between Dallas and Austin to provide businesses with advantages in international trade and distribution, such as tariff exemption on goods that are imported, manufactured, and then exported.

Existing Locations:¹⁰⁸ Waco Regional Airport, Waco International Airpark (TSTC Airport), Texas Central Industrial District, Texas Central Park and Waco International Aviation Park. Other areas can be incorporated via subzone designation or minor boundary modification.

Water:

As in most of Texas, the Heart of Texas region is placing increasing emphasis on water management and drought Preparedness.

Regional Water Demand



Commuting to Work:¹⁰⁹

Commuting to work has a number of implications for transportation and municipal services, including need for public transit, and congestion on roads. According to the American Community Survey (ACS) The Heart of Texas region had a total of 157,436 workers aged 16 and over commuting to work. Of these commuters,

- 82.9% drove their car to work alone, vs. 80.5% for the State of Texas.
- 10% car-pooled, the same as the State of Texas.
- 0.3% used public transportation, lower than the State of Texas' 1.4%.
- 2% walked to work, higher than the State of Texas 1.5%.
- 1.2% used other means to get to work, vs. 1.6% for the State of Texas, and
- 3.6% worked from home, vs. 5% for the State of Texas.



Factors Directly Affecting Economic Performance

State Incentives¹¹⁰

The State of Texas offers a wide variety of incentives to attract businesses to Texas. Texas takes the initiative to invest in its future by offering competitive incentives to companies who are creating jobs and driving innovation in Texas. The incentives in this section are a summary of the most commonly utilized state offerings administered by the Department of Economic Development Finance.

Texas Enterprise Fund

The Texas Enterprise Fund (TEF) is the largest “deal-closing” fund of its kind in the nation. The fund is used as a final incentive tool for projects that offer significant projected job creation and capital investment and where a single Texas site is competing with another viable out-of-state option.

www.texaswideopenforbusiness.com/services/texas-enterprise-fund

Texas Enterprise Zone Program

The Texas Enterprise Zone Program is an economic development tool for local communities to partner with the State of Texas to promote job creation and significant private investment that will assist economically distressed areas of the state.

www.texaswideopenforbusiness.com/services/tax-incentives

Skills Development Fund

The Skills Development Fund is an innovative grant program created to assist Texas public community and technical colleges finance customized job training for their local businesses.

www.twc.state.tx.us/partners/skills-development-fund

Texas Capital Fund

The Texas Capital fund Infrastructure Development and Real Estate Programs are economic development tools designed to provide financial resources to non-entitlement communities. Funds from the program can be utilized for public infrastructure needed to assist a business that commits to create and/or retain permanent jobs, primarily for low- and moderate-income persons. Funds from the real estate program must be used for real estate development to assist a business that commits to create and/or retain permanent jobs, primarily for low and moderate-income persons. The real estate and/or improvements must be owned by the community and leased to the business.

www.texasagriculture.gov/grantsservices/ruralEconomicDevelopment/TexasCapitalFund.aspx

Product Development and Small Business Incubator Fund

The Product Development and Small Business Incubator Fund (PDSBI) is a revolving loan program financed through original bond issuances. The primary objective of the program is to aid in the development, production and commercialization of new or improved products and to foster and stimulate small business in the State of Texas.

Waco-McLennan County Economic Development Corporation

Cash grant program for new job creation and capital investment in support of existing industry expansion and new business attraction.

Waco Industrial Foundation

Non-profit real estate development foundation that works with economic development partners for the qualified project. Purchases land and develops infrastructure in industrial areas.

Tax Abatements from City, County, Community College

Real and/or personal property tax abatements for value-added investment and job creation in new facilities and business expansion.

Business Grant Program from City and County

Grant program for qualified projects based on location, capital investment and job creation. The program provides grants for value-added real and/or personal property investments in an amount equal to all or a portion of the increased taxable value.

Freeport Tax Exemption from City, County, School Districts

Inventory tax exemption available to companies for products that leave the state of Texas within 175 days of manufacture or entry into Texas. McLennan County, the cities of Waco, McGregor, Beverly Hills and Bellmead, and five area school districts (Bosqueville, LaVega, McGregor, Moody and Waco) offer tax exemption to companies within these jurisdictions.

Aircraft components are eligible for 670 days from exemption for qualifying components that leave the state.

Regional Economic Development Corporations

Regional economic development corporations and municipalities outside of Waco work in partnership with the Greater Waco Chamber to support business growth within their jurisdictions. EDC's can provide incentives in the form of grants, loans and development assistance.

Historic Preservation Tax Credit

Municipal tax credit on locally designated or recognized historic property that undergoes rehabilitation.

Owner-Occupied Renovations and Development Tax Abatement

Encourages redevelopment/renovation of substandard structures that create mixed-use facilities associated with the Brazos River Corridor and the Public Improvement District.

Tax Exempt Bond Financing

The program offers businesses the opportunity to apply for facility bonds. Bonds are used to finance property development at lower interest rates than conventional financing.

Tax Increment Financing

Three designated incentive zones within Waco's central city for revitalization and development projects.

Taxes:¹¹¹

Personal Taxes

- There are no personal income taxes in the State of Texas.

Corporate Taxes

- There are no corporate taxes in the State of Texas. There is however a Franchise Tax as follows.

Franchise Tax

- The Texas franchise tax is a privilege tax imposed on each taxable entity chartered/organized in Texas or doing business in Texas. Please see the following website for more information. www.comptroller.texas.gov/taxinfo/franchise

Ad-Valorem Tax Rates - Local

Inventory Taxes

- Inventory would be taxed at the same rates as noted above. Qualifying businesses can apply for Freeport Tax Exemption and Goods-in-Transit Exemption in some cases.

Sales and Use Tax Rates

Following are the sales and use tax rates for the proposed location:

- City General Fund – 1.5%
- City EDC – .5%
- State of Texas – 6.25%

Other Factors Related to Economic Performance

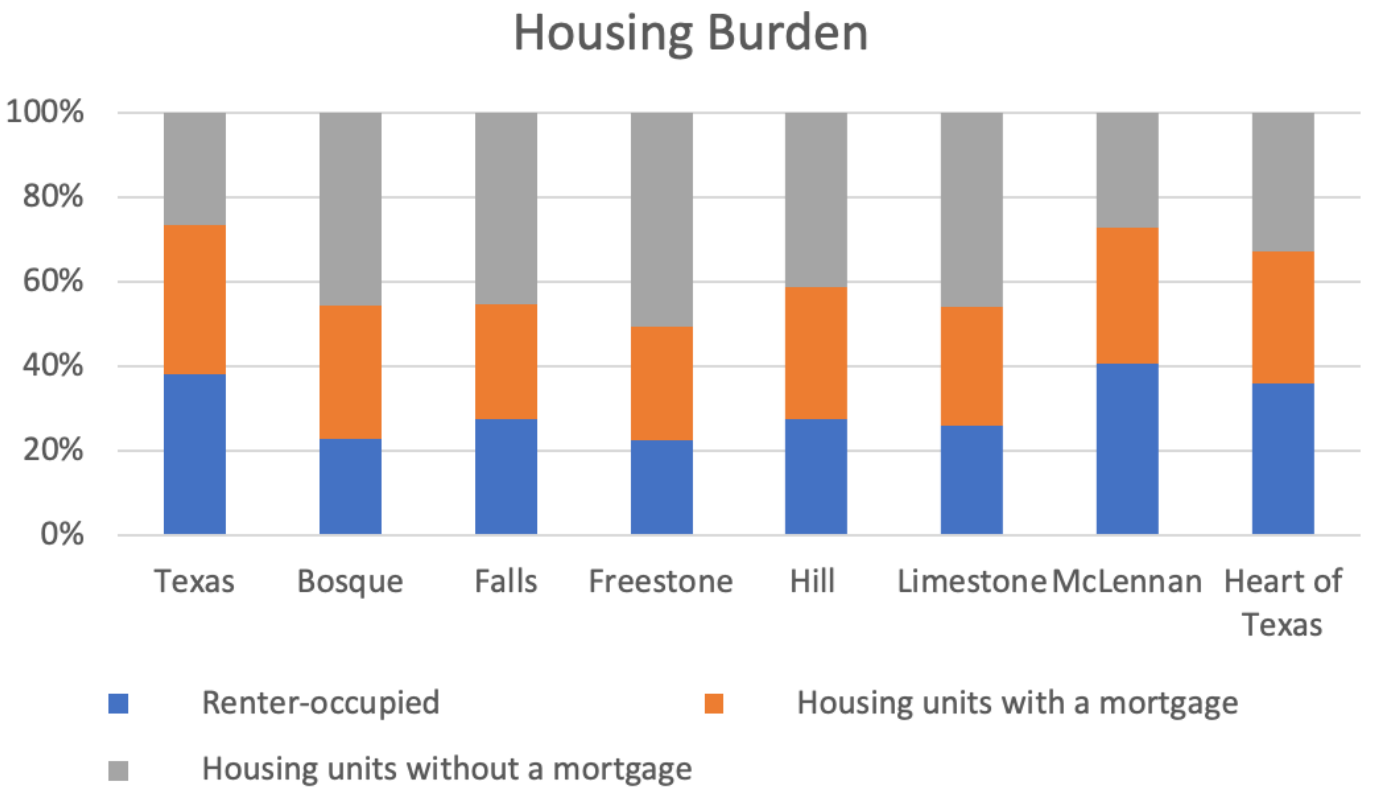
- Safety
 - Close-knit communities with good neighbors
- Walking score
 - Streets in need of repair
 - No sidewalks
- Cultural challenges
 - The Heart of Texas region is predominantly white with little diversity



Housing¹¹²

- The Heart of Texas region has a **high percentage of vacant housing** (15.9% vs. 11.4% in State of Texas). This creates an opportunity to attract people in search of affordable housing.
- More than 25% of housing is vacant in Bosque, Falls, and Freestone counties.

	Texas	Bosque	Falls	Freestone	Hill	Limestone	McLennan	Heart of Texas
HOUSING OCCUPANCY								
Total housing units	10,937,026	9,767	7,781	9,495	16,337	10,731	101,142	155,253
Occupied housing units	88.60%	73.80%	66.80%	71.20%	79.50%	78.10%	89.00%	84.1%
Vacant housing units	11.40%	26.20%	33.20%	28.80%	20.50%	21.90%	11.00%	15.9%

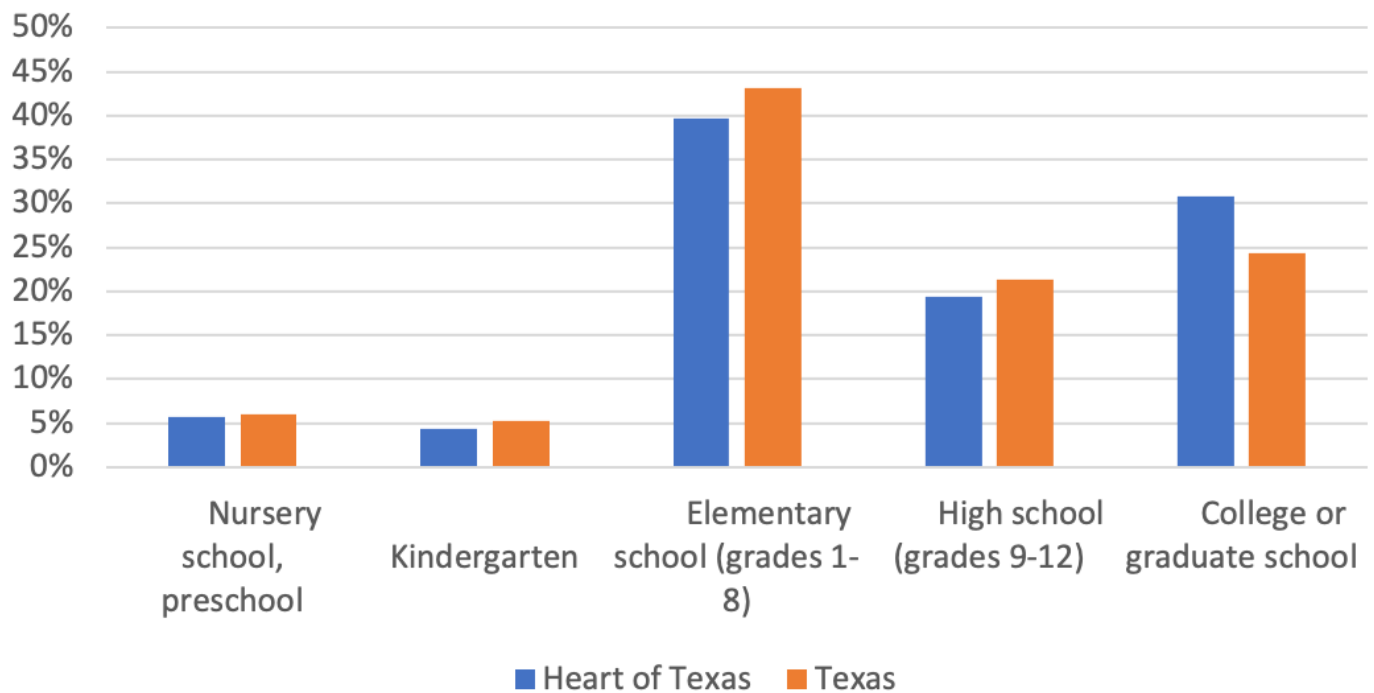


Education

Enrollment

- Of all the individuals enrolled in school in 2019, Heart of Texas has a higher percentage of the enrolled in higher education. Those with some college, even without obtaining a credential, are more likely to hold a job than those with just a high school diploma.
- However, there is a gap in attainment of bachelor's degrees compared with the state of Texas (21.5% vs. 29.9%).

School Enrollment



Heart of Texas Texas

SCHOOL ENROLLMENT	Estimate	Percent	Estimate	Percent
Population 3 years and over enrolled in school	100,223		7,681,758	7,681,758
Nursery school, preschool	5,669	5.7%	458,628	6.0%
Kindergarten	4,444	4.4%	409,022	5.3%
Elementary school (grades 1-8)	39,719	39.6%	3,312,486	43.1%
High school (grades 9-12)	19,462	19.4%	1,638,387	21.3%
College or graduate school	30,929	30.9%	1,863,235	24.3%

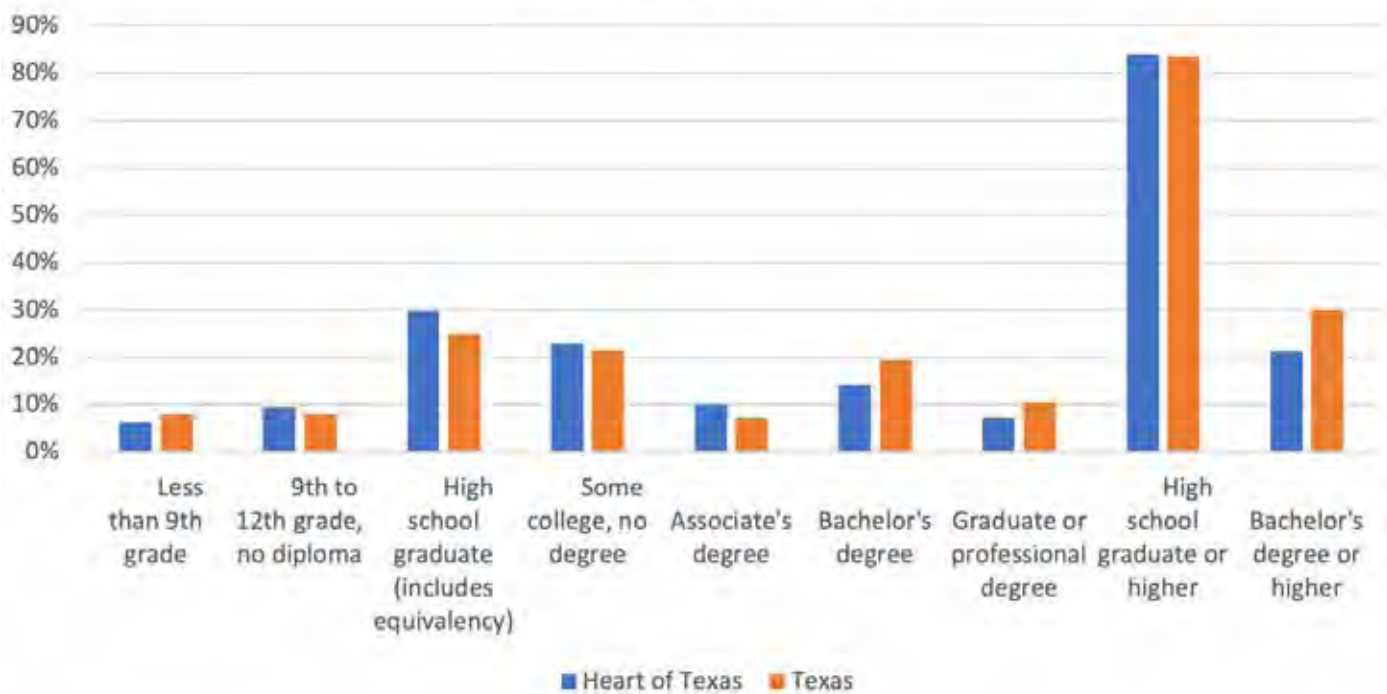


Educational Attainment

- There is an education gap when comparing the Heart of Texas region to the State of Texas.

EDUCATIONAL ATTAINMENT	Heart of Texas		Texas	
	Estimate	Percent	Estimate	Percent
Population 25 years and over	232,108	100.0%	18,131,554	100.0%
Less than 9th grade	14,573	6.3%	1,482,952	8.2%
9th to 12th grade, no diploma	22,478	9.7%	1,475,007	8.1%
High school graduate (includes equivalency)	68,850	29.7%	4,525,099	25.0%
Some college, no degree	53,227	22.9%	3,918,815	21.6%
Associate's degree	23,178	10.0%	1,309,005	7.2%
Bachelor's degree	32,740	14.1%	3,534,714	19.5%
Graduate or professional degree	17,062	7.4%	1,885,962	10.4%
High school graduate or higher	195,057	84.0%	15,173,595	83.7%
Bachelor's degree or higher	49,802	21.5%	5,420,676	29.9%

Educational Attainment



- There are six institutions of higher education in the Heart of Texas region
 - One Private Institution, Baylor University,
 - 3 community colleges, Hill College, McLennan Community College, and Navarro College,
 - Texas State Technical College.
- Southern Careers Institute is a for-profit institution offering vocational training in various fields such as medical billing and coding, medical office specialist, medical assistant and welding. It is authorized to grant associate degrees, grant credits toward degrees, and to use certain protected academic terms at the Austin, Texas campus by the Texas Higher Education Coordinating Board.¹¹³ Additionally, Southern Careers Institute has been accredited for over 25 years by The Commission of the Council on Occupational Education (COE), and is also approved by the Texas Workforce Commission (TWC), and Texas Veterans Commission to train eligible veterans.¹¹⁴
- Texas State Technical College is now offering an **Industrial Systems training program**, designed to provide our students with a wide range of valuable skills, from basic machining to boiler maintenance and even programmable logic controllers, which are the prevalent control systems in the industry today. With a labor force education in Industrial Systems, Heart of Texas will become an attractive area to bring industrial systems, welding, and other heavy equipment and manufacturing fields.¹¹⁵
- Tesla to create **talent pipeline through partnership with Texas State Technical College** - partner with this institution to attract articulation agreements to provide curriculum and study to create talent pipeline in region.
- University Center at McLennan Community College in Waco¹¹⁷
 - This opportunity **local students to pursue undergraduate and graduate degrees from Texas Tech University, Tarleton State University, Midwestern State University, The University of Texas Medical Branch**. The program allows student to remain in their jobs and at home, and the average cost of tuition and fees less than \$25,000.
- Baylor Research and Innovation Collaborative:¹¹⁸
 - City of Waco, City of Bellmead, Greater Waco Chamber, Cooper Foundation, McLennan County, Texas State Technical College, and Waco Foundation partnered with Baylor University, created a **high technology research, workforce development/training and industry solutions center**. The BRIC allocates 45,000 square feet for an advanced workforce technology training and workforce development center to be used by its partner, Texas State Technical College Waco, on behalf of BRIC clients.

Institution Name ¹¹⁹	Street address or post office box (HD2019)	City location of institution (HD2019)	ZIP code (HD2019)	County name (HD2019)
Baylor University		Waco	76798	McLennan County
Hill College	112 Lamar Dr	Hillsboro	76645	Hill County
McLennan Community College	1400 College Dr	Waco	76708	McLennan County
Southern Careers Institute-Waco	700 South IH-35 Suite A	Waco	76706-3756	McLennan County
Texas State Technical College	3801 Campus Drive	Waco	76705	McLennan County
Navarro College	901 N Dr M.L.K. Jr. Hwy	Mexia	76667	Limestone County

SWOT Analysis

Strengths

The following list represents the current distinctive economic strong points of the region.

Economic Diversity:

- **Diverse industries:** A diverse group of employers spanning a wide variety of industries ranging from agriculture to manufacturing and production facilities, warehousing, distribution, logistics and supply chain, renewable energy, hospitality, office and retail already have a presence, or are planning to enter the region in the near future, creating jobs and tax revenue.
- **Retail and Entertainment Centers** are being built, which will attract visitors and create jobs:
 - Magnolia Market at the Silos¹²⁰ will be a large entertainment and dining center that will attract visitors and tourists from all over the United States. Currently Magnolia employs more than 600 people.
 - 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center¹²¹
 - Will provide employment in the construction, manufacturing, healthcare, hospitality and logistics sectors.
 - Brazos Riverfront,¹²² an active mixed-use waterfront district along the Brazos River in downtown Waco, Texas and adjacent to Baylor University will combine residential, retail, restaurant, small office and hotel uses along walkable streetscapes and open space.
- **Warehousing/Distribution:**
 - The introduction of Amazon Fulfillment Center¹²³ will create 1,000 jobs paying \$15 an hour, and is a good step toward economic recovery.
 - It will also put Heart of Texas on the map as a distribution and logistics hub.
 - Holt Cat¹²⁴ is the largest distributor of Caterpillar equipment and will provide 100 jobs.
 - Ryonet Corporation,¹²⁵ a screen printing supply distributor, will employ 10 people with plans for growth.
- **Manufacturing and Production** companies are flocking to the region.
 - There are more than 30 aviation and aviation-related companies that manufacture aircraft, components and materials in the greater Waco region.¹²⁶
 - Hello Bello's¹²⁷ Diaper manufacturing and distribution company will create 110 jobs.
 - Merrick Engineering,¹²⁸ a leading manufacturer of plastic and injection molded consumer product, will create 20 jobs.
 - Envases Group,¹²⁹ a Mexico-based global leader in the production of packaging solutions, will create 120 jobs.
 - ZinkPower,¹³⁰ leader in hot-dip galvanizing and powder-coating services, will create 100 jobs.
 - Aspen Custom Trailers,¹³¹ a high-end custom commercial trailer manufacturer, will add 70 new highly skilled jobs.
 - Laminate Technologies,¹³² a laminate panel and fabrication manufacturer, will create 40 jobs.
 - Advanced Rail Systems, leaders in railway automation, will create 69 new high-skilled jobs.¹³³
 - The Coca-Cola Company,¹³⁴ a national manufacturing company, will expand their facility, retaining 350 jobs and creating 20 new jobs.

- Healthcare
 - New Era Partners,¹³⁵ a Behavioral Health Hospital network, will create 90 jobs.
- **Renewable Energy**
 - Introduction of wind and solar farms to the region, providing tax revenue.

Business Attraction

- **Central Location:** Heart of Texas is centrally located and well situated to market itself as a transportation and logistics hub:
 - The region is strategically placed between some of the fastest growing cities in the country. Lower land costs make it affordable and convenient for a company to serve the Austin, Dallas, Houston, and San Antonio markets.
 - A central geography provides logistical efficiencies and significant reduction in freight.
 - Access to both I-35 and I-45, and US Highway 84, which makes the region within easy driving distance of four of the fastest growing metropolitan areas in the country.
 - Old Mexia-Fairfield road was expanded for **increased commercial and industrial traffic**. The project will help retain and encourage existing business to expand and draw manufacturing and industrial users to the newly completed Industrial Park by providing a roadway facility that can support truck traffic, and improve access to and from Interstate 45, which a vital infrastructure route between Houston and Dallas.
 - TxDOT is adding four lanes to each side of I-35, with complete reconstruction to frontage roads, in order to keep up with Waco's growing popularity. The I-35 project is on track to be completed in the next 3 years (2023).¹³⁶
- Seven industrial parks
 - Texas Central Park¹³⁷
 - Robinson Business Park¹³⁸
 - Waco International Aviation Park¹³⁹
 - Waco Regional Airport Industrial Park¹⁴⁰
 - Fairfield Industrial Park North¹⁴¹
 - Fairfield Industrial Park South¹⁴²
 - Mexia Industrial Park¹⁴³
- Proximity to
 - Port of Houston
 - Union Pacific Railway,¹⁴⁴ which operates a line-haul route through Bellmead Yard in McLennan County
 - South of the UP Dallas Intermodal Terminal in Wilmer, TX.
 - Access to the BNSF Teague Terminal

- **Low Costs**

- The region has a low cost of talent versus the national average.
- Property costs are lower within the region as compared to major metropolitan markets.
- There are no personal income taxes in the State of Texas.
- There are no Corporate Taxes in the State of Texas.
- The Texas franchise tax is a privilege tax imposed on each taxable entity chartered/organized in Texas or doing business in Texas.
- Reasonable regulations

Talent Supply

- **Skilled Workforce:** The ability to attract manufacturing facilities and production operations due to the region's location, land, and skilled workforce is a strength. Additionally, access to educational resources and partnerships to build a talent pipeline are being used to train talent in aerospace engineering, aircraft maintenance and management, electric vehicle maintenance and industrial systems, which can be marketed to attract more companies to the region.

Environmental Resources:

- **Favorable Climate**

- Abundant water and natural resources
- Solar and Wind Energy
 - Land, solar and wind resources for renewable energy brings in tax revenue, helps air quality, reduces solar footprint and overall energy costs to consumers.
- Farms are currently being built, including:

- **Wind**

- Engie, in Limestone and McLennan¹⁴⁵
 - Prairie Hill Wind Farm project¹⁴⁶ in McLennan and Limestone

- **Solar**

- Cypress Creek Renewables in Robinson¹⁴⁷
 - Hecate Energy LLC in Falls¹⁴⁸
 - Eddy II in Bruceville-Eddy¹⁴⁹
 - OCI Solar Power in Falls¹⁵⁰
 - Glory Leasing in McLennan and Bosque¹⁵¹

- **Usable Land**

- There is space to build, including in the region's business parks.

Quality of Life

- Relatively low cost of living, no personal income taxes and low housing costs
- Diverse and abundant outdoor recreation opportunities and an extreme sports hub
- Access to hospitals and high quality medical care (the center of the region is the medical epicenter of the area)
- Access to local transit
 - **Heart of Texas Rural Transit District** offers demand response transportation to the general public. Clients call to schedule rides to their specific destination with service based on availability.¹⁵²
 - **Waco Transit**,¹⁵³ or WTS, offers single rides for \$1.50 and unlimited fixed route rides for the duration of the calendar day during normal operating hours, for only \$3.
 - **FREE Shuttle Service in Downtown**, running every 15-20 minutes, Monday through Saturday, from 9 a.m. to 6:30 p.m.¹⁵⁴
- Six higher education institutions and Baylor Research & Innovation Collaborative (BRIC) Research Campus
- Magnolia Market at the Silos will be a large entertainment and dining center that will attract visitors and tourists from all over the United States.
- 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center.¹⁵⁵
- Brazos Riverfront,¹⁵⁶ an active mixed-use waterfront district along the Brazos River in downtown Waco, Texas and adjacent to Baylor University
- Agricultural assets; and strong regional commitment to local foods and Farmers Markets
- Tourism opportunities
- Sense of community in small towns
- Community and regional planning and cooperation:
 - HOTEDD CEDS and Heart of Texas Efficient Towns & Counties Co-op (HOTETC),
- Strong regional disaster preparedness and coordination

Weaknesses

Economic Diversity

- Heavy economic reliance on coal, oil, and gas, during a time when the nation and the State of Texas are focusing on renewable energy and becoming less dependent on coal, oil, and gas means that jobs and wealth are leaving the region.

Business Attraction

- Decaying infrastructure

Talent Supply

- Low educational attainment of workforce, lack of skills training
- Many of the graduates of the area's university and colleges, including 2-year, 4-year and advanced study programs, seek employment elsewhere because of better opportunities and wages.¹⁵⁷
- Aging population in rural areas

Environmental Resources

- Wind and solar farms provide inexpensive access to renewable energy and tax revenue, but do not provide a high number of new jobs.

Quality of Life

- Economically depressed region:¹⁵⁸
 - For the region as a whole, unemployment is one percentage point below the U.S. rate, however,
 - 2019 Per Capita Money Income was \$25,229, or 74% of the U.S. amount of \$34,103.
 - 2019 Per Capita Personal Income was \$41,272, or 73% of the U.S. amount of \$56,490.
 - Poverty rate is higher than national and state averages.
 - Generational poverty; high rates of poverty throughout the region (a condition that stifles economic growth in the entire region)
- A post-agricultural economy with relatively low-skilled workforce and low median wage
- Little entertainment in the region (Magnolia at the Silos, and Cottonwood Creek are adding additional entertainment centers, but only in Waco and is not being addressed other counties)
- Perception that the pay is higher and there are more job opportunities in the more urban centers
- Public transportation challenges of a mainly rural region, while service is available, distances to employment and healthcare are long, and service needs to be expanded to meet that need.
 - **Heart of Texas Rural Transit District** offers demand response transportation to the general public from Monday through Friday. Clients call to schedule rides to their specific destination with service based on availability.¹⁵⁹
 - **Waco Transit**,¹⁶⁰ or WTS, offers single rides for \$1.50 and unlimited fixed route rides for the duration of the calendar day during normal operating hours, for only \$3.
 - WTS is looking to expand service as Holt, Amazon, and other companies enter the region.¹⁶¹
 - **FREE Shuttle Service in Downtown**, running every 15-20 minutes, Mon. through Sat., from 9 a.m. to 6:30 p.m.¹⁶²

Opportunities

Economic Diversity

- The Economy is already beginning to diversify in the region with many new entries.
- **Retail and Entertainment Centers** are being built, which will attract visitors and create jobs:
 - Magnolia Market at the Silos¹⁶³ will be a large entertainment and dining center that will attract visitors and tourists from all over the United States.
 - 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center.¹⁶⁴
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 - Merrick Engineering¹⁶⁹
 - Leading manufacturer of plastic and injection molded consumer product
 - Envases Group,¹⁷⁰ a Mexico-based global leader in the production of packaging solutions
 - ZinkPower,¹⁷¹ leader in hot-dip galvanizing and powder-coating services
 - Aspen Custom Trailers,¹⁷² a high-end custom commercial trailer manufacturer
 - Laminate Technologies,¹⁷³ a custom laminate panel and fabrication manufacturer
 - Advanced Rail Systems,¹⁷⁴ leaders in railway automation
 - SpaceX¹⁷⁵
 - The Coca-Cola Company¹⁷⁶ expansion
- **Corporate Headquarters**
 - Texas Meter & Device¹⁷⁷ will construct new corporate headquarters.
- **Healthcare**
 - New Era Partners,¹⁷⁸ Oceans Behavioral Health Hospital network
- **Renewable Energy**
 - Introduction of wind and solar farms to the region, providing tax revenue

Business Attraction

- The region is strategically placed between some of the fastest growing cities in the country (Austin, Dallas, Houston, San Antonio) and attracting investment like never before.
 - Seven industrial parks with land to build on and access to highways leading to Houston and Dallas:
 - Built out Old Mexia-Fairfield road for increased commercial and industrial traffic, providing a roadway facility that can support truck traffic, and improve access to and from Interstate 45, which is a vital infrastructure route between Houston and Dallas.
 - Blacklidge will set up a production site in the Fairfield park, hiring 12 full-time positions.
 - Mustang Oilfield Services, LLC and oil field swabbing services and diesel repair company with 20 employees.
 - Energy Transfer Company will utilize the reconstruction portion of the road and is engaged in transportation and storage of natural gas at the Reed Compressor Station located at the end of the Old Mexia-Fairfield road with 12 employees.
 - Morrison Lawn Service M & W Waste Management, LLC has been operating for over 20 years at the end of the Old Mexia-Fairfield road with 10 employees.
- Proximity to:
 - Port of Houston
 - Union Pacific Railway,¹⁷⁹ which operates a line-haul route through Bellmead Yard in McLennan County
 - South of the UP Dallas Intermodal Terminal in Wilmer, TX.
 - Access to the BNSF Teague Terminal
- McLennan County and the surrounding region attracts manufacturing facilities and will put the region on the map as a distribution and logistics hub.
- Can offer incentivized land pricing, rail infrastructure improvements.
- Robust incentives to attract new businesses:
 - Land cost reductions or grants
 - Cash grants for Equipment & Infrastructure
 - Assistance with costs of infrastructure and utilities necessary to develop a property or establish the business
 - Assistance with workforce training and development through our Navarro College Career & Technical Center
 - Ad-Valorem Taxes
 - Sales Tax Grants
 - Construction Sales Tax
 - Building and Utility Connection Fees
 - Expedited and hassle free development review
 - Freeport Tax Exemption
 - Workforce Assistance
 - Small Business Focus
 - Texas Enterprise Zone Program

Talent Supply

- **A workforce education and training network:** Partnering with local institutions to train local workforce and create attractive talent pipeline. With the trend toward greater skill requirements for employees, the region has partners in place that could help provide needed skill sets.
 - Texas State Technical College is now offering an Industrial Systems training program, designed to provide our students with a wide range of valuable skills, from basic machining to boiler maintenance and even programmable logic controllers, which are the prevalent control systems in the industry today. With a labor force education in Industrial Systems, Heart of Texas will become an attractive area to bring industrial systems, welding, and other heavy equipment and manufacturing fields.¹⁸⁰
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 - Baylor Research and Innovation Collaborative:¹⁸³
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Environmental Resources

- Wind and Solar Farms are being built, powering homes and providing tax revenue and helping air quality. These include:
 - **Wind**
 - Engie, in Limestone and McLennan¹⁸⁴
 - Prairie Hill Wind Farm project¹⁸⁵ in McLennan and Limestone
 - **Solar**
 - Cypress Creek Renewables in Robinson¹⁸⁶
 - Hecate Energy LLC in Falls¹⁸⁷
 - Eddy II in Bruceville-Eddy¹⁸⁸
 - OCI Solar Power in Falls¹⁸⁹
 - Glory Leasing in McLennan and Bosque¹⁹⁰
- Can join the movement toward replacing coal, oil, and gas with renewable energy, operating solar and wind farms and earning tax revenue and improving air quality.

- **Partner with Starbucks or other large companies to provide power**¹⁹¹

- Starbucks has teamed with Cypress Creek Renewables and U.S. Bank to generate enough juice to power 360 Starbucks outlets, including locations in Houston, Dallas, Fort Worth, Plano and Arlington.
- Starbucks is separately investing in six Cypress Creek-owned solar farms in Texas, representing 50 megawatts of solar energy.

Quality of Life

- Increase public transit access to McLennan County so people living in the remaining counties can work at the new businesses being established there.
- Mixed-use development continues to be built, while family-friendly activities lure crowds downtown after hours.
 - Magnolia Market at the Silos will be a large entertainment and dining center that will attract visitors and tourists from all over the United States.
 - 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center.
 - Brazos Riverfront,¹⁹² an active mixed-use waterfront district along the Brazos River in downtown Waco, Texas and adjacent to Baylor University will combine residential, retail, restaurant, small office and hotel uses along walkable streetscapes and open space.
- Affordable tax rates and cost of living
 - There are no personal income taxes in the State of Texas.
- Overall moderate population growth in McLennan County
- Available and growing health care network. In a region already well-served by high-quality medical care, recent expansions and mergers have ensured the rapid growth in available facilities, jobs, and care providers to citizens of the region.
- Tourism destinations. Attractions include Richland-Chambers Reservoir and Fairfield Lake State Park, Lake Whitney, Lakes Limestone and Mexia, Falls on the Brazos, Lake Waco, and numerous other parks, museums, and historic attractions.
- Good corporate and community relationships. A large number of locally-owned businesses in the MSA combined with the close ties that bind longtime neighbors in Waco as well as the rural communities have contributed to a sense of civic involvement and commitment on behalf of the region's business community. With few exceptions, local governments also enjoy and reciprocate positive relationships.
 - This is evident in how the community came together during the onset of the COVID-19 pandemic, providing 75 tons of food for families in need.
- Existing economic development organizations. The local educational institutions, Workforce Solutions of the Heart of Texas, Small Business Development Center, local communities and EDC's/IDC's, Chambers of Commerce, and other partners provide a wide variety of resources and a wealth of expertise.
- Popular TV show, *Fixer Upper with Chip & Joanna Gaines* showcases Waco and the Heart of Texas region; Baylor University and stadium complex growth, down-town Waco and Brazos River corridor redevelopment. Additionally, smaller communities are attracting investment and tourism with restorations of historic downtowns, adding farmers markets and other family friendly amenities.

Threats

Economic Diversity

- Much of the growth and attraction of new businesses is consolidated in McLennan county, which leaves the remaining counties in need of investments.
- Lack of economic diversity means small communities are hit hard when one business goes down due to economic, man-made or natural disasters.
- Coal, oil, and gas are leaving the region, resulting in loss of jobs and tax revenue which need to be replaced by a promising industry.
 - Oil and gas pipeline construction appears in the top five unemployment claims in four of the six counties.¹⁹³

Business Attraction

- The exodus of Big Brown Plant and Manitou Group and thus the coal, oil, and gas industry in a region may not appear to be outwardly attractive to companies considering coming to the region.
- Lack of access to capital for small businesses. While within the Waco MSA a large number of locally-owned banks compete for business, it is difficult for would-be entrepreneurs and existing business owners to find financing both in Waco and throughout the region. Additionally, there is a very low usage of USDA and SBA loan products in the region.

Talent Supply

- The Heart of Texas region as a whole has a lower educational attainment level, which translates to a lower skilled workforce.
- Tesla¹⁹⁴ offers a 12-week electric vehicle service training program, culminating in a 2-year employment contract at a Tesla Service Center, however, completing this program will likely require relocation out of the Heart of Texas area.

Environmental Resources

- Drought is always possible in an arid climate
- Renewable energy, while has to potential to bring in tax revenue and help air quality, doesn't bring in a lot of jobs to create wealth in the region. Should focus on Manufacturing, Production, and Distribution instead, which bring many more jobs.
 - Solar Power company OCI only plans on hiring one person at an annual wage of \$48,000 once the project is operational in 2022, compared to the Amazon Fulfillment Center, which will bring 1,000 jobs to the region.

Quality of Life

- Overall moderate population growth, but concentrated only in McLennan County
 - A decline in population in the rural counties coupled with outmigration of citizens under 35 years of age has numerous negative impacts including limited workforce and declining tax rolls.
- Wages in the Heart of Texas region continue to lag behind the state and national averages. This can cause working aged individuals to exit the region in pursuit of better pay elsewhere.
- Rising costs of transportation increase barriers to gainful employment for rural and sub-urban populations.
- Declines in property value and in population have rendered a portion of the built environment unsalvageable.
- Well-paved streets, water and sewer capacity are on the decline, causing a need for infrastructure investment.
- Water quantity and quality are low due to both the inadequacy of existing physical infrastructure, such as lakes, and the drop in aquifers, municipalities and rural water supply. At the same time, deteriorations in treatment and distribution systems have made it harder to deliver clean water even when raw supplies are sufficient.
- Poverty, unchecked, demoralizes, dispirits and disheartens individuals and families; disembowels communities; severely weakens counties, and operates as the ultimate impairer of the economic potential of regions.



Strategic Direction/Action Plan

Guiding Principal

Grow the Economy: Create economic prosperity for all through growth of the region's tax and employment base.

Vision

HOTEDD will work in collaboration with the counties, communities, economic development entities, business, industry, and the stakeholders of the Heart of Texas to grow the economy of the region. We will work together to establish the Heart of Texas as the premier region of the state to live, work, and play, and to start, grow, sustain or move a business or organization.

Strategic Direction:

The Heart of Texas region is an area in transition – one steeped in a history of oil, gas, coal and agriculture that has an opportunity to transform itself and its future in line with the meteoric growth of the state of Texas. This strategic plan outlines some of the key steps that must be taken to realize the opportunities available to the region and its citizens in order to create a more diversified and resilient economy.

The Heart of Texas region is transforming itself into a regional hub for innovation, manufacturing and distribution – a place where residents of all ages have access to education and opportunities for personal growth and enrichment. HOTEDD is working to support local communities in their efforts to achieve this economic transformation. The below goals and key performance indicators (KPI) will help to guide our efforts.

Goals/Objectives

Goal 1: Support communities in their efforts to strengthen the broadband infrastructure necessary to support business growth, remote workers and remote learning

KPI 1: Support research efforts to determine areas of the region with insufficient broadband access.

KPI 2: Support community efforts to identify broadband providers interested in expanding within the state and region.

KPI 3: Help communities to identify funding mechanisms to pay for broadband expansion.

KPI 4: Support the agreements necessary to facilitate broadband expansion.

KPI 5: Assist local communities in increasing regional broadband access by 20%.

Goal 2: Support communities in their efforts to establish the region as a destination for entrepreneurship and opportunities

KPI 1: Help to promote entrepreneurial programs and educational opportunities coming out of Baylor University's department of Entrepreneurship and Corporate Innovation.

KPI 2: Support communities looking to establish a regional incubator for local startups.

KPI 3: Support programs designed to increase utilization of the McLennan SBDC.

KPI 4: Support communities looking to increase business startups within the region.

Goal 3: Advance regional economic progress by increasing hard economic development capacity and infrastructure



KPI 1: Provide support for infrastructure and community improvements that support development, redevelopment and revitalization of the built environment .

KPI 2: Support communities in their efforts to improve public transportation services to reduce travel times and ensure that workers throughout the region can get to work in a timely manner.

KPI 3: Support communities as they gather information, coordinate surveys, reports and planning for the further development of I-35 and I-45.

KPI 4: Apply for grants from state and federal sources that will enhance HOTEDD's technical assistance capabilities to build capacity throughout the region and to fund continued work on economic development projects.

KPI 5: Assist communities with grant applications to EDA, TDA, USDA and other federal, State and private sources especially those that address the regional development of hard infrastructure assets.

KPI 6: Encourage local housing policy that promotes quality affordable housing, and the repair or removal of substandard housing.

KPI 7: Increase HOTEDD staff and Board member outreach and training in the community.

KPI 8: Support community-driven initiatives that improve neighborhoods and town centers that stimulate economic activity and promote the development of quality communities.

KPI 9: Identify a path forward for further work and implementation of the land use, housing, infrastructure, economic development, and environmental planning work done in the 2011-2015 HUD Sustainable Communities Grant (A.K.A. The Heart of Texas Efficient Towns and Counties Co-Op Project (HOTETC)) to help ensure that future development decisions continue to apply and utilize these important findings.

Goal 4: Support communities in their efforts to market the region to target industries

KPI 1: Provide communities with the data they need to evaluate the viability of potential target industries. Preliminary industries could include agribusiness, advanced manufacturing, aerospace, distribution and green energy.

KPI 2: Provide communities with the information and data they need on regional assets that could benefit target industries.

KPI 3: Help communities with their marketing efforts and in responding to requests for information.

Goal 5: Support communities as they develop a sense of place for the region and individual counties

KPI 1: Support communities in their efforts to identify the unique assets and strengths of each county as part of the placemaking process. Initial ideas include:

- Bosque County as a retirement community and artist destination
 - Falls County as a place for families
 - Hill County as a charming community with historic downtowns and amenities
 - Limestone County as a charming rural community adjacent to Waco
 - Freestone County as an agricultural community with new opportunities
 - McLennan County as an entrepreneurial hub and emerging urban city
-

KPI 2: Support communities in their efforts to create individual placemaking brands for each county. This may include:

- Branding materials
 - Print collateral
 - Tradeshow materials
-

KPI 3: Support community efforts to market the region through a digital marketing campaign.

Goal 6: Support community efforts to retain local talent

KPI 1: Support community efforts to use placemaking to create a sense of place and brand for the region.

KPI 2: Support community efforts to market regional quality of life advantages.

KPI 3: Support community efforts to increase vocational training in schools.

KPI 4: Support community efforts to create financial programs such as home buying down payment programs, student loan forgiveness or tax incentives that encourage skilled graduates to remain the region after graduating from Baylor or local community colleges and technical schools.

KPI 5: Support community efforts to increase retention of graduating talent by 10%.

Goal 7: Support community efforts to attract talent from Texas metropolitan areas

KPI 1: Support community efforts to use regional placemaking strategy as a basis for branding the region to prospective workforce.

KPI 2: Support the advertisement regional advantages such as a lower cost of living and lack of traffic using a targeted digital marketing campaign.

KPI 3: Support community efforts to attract talent using strategies to¹⁹⁵ create “a dynamic, growing job market”. Studies have shown “that rural counties with higher salaries and job growth were especially effective in attracting workers from urban areas, with local economic conditions having a larger effect for short distance moves. Natural amenities — think scenic landscapes and pleasant climates — matter more in remote rural places for attracting urban residents.”

Goal 8: Increase economic development readiness among local jurisdictions

KPI 1: Create an online database of tools economic developers can utilize.

KPI 2: Use Heart of Texas COGs website to publish updated demographic data and key information that site selectors would ask for.

KPI 3: Provide local jurisdictions with reporting tools that make it easier to respond to site selector requests.

KPI 4: Provide annual training for local jurisdictions on key economic development issues and best practices.

KPI 5: Survey local jurisdictions to determine what resources, tools and education they need to be prepared to respond to site selector requests.

Goal 9: Help communities to increase the access local businesses have to capital

KPI 1: Provide loan application assistance to entrepreneurs and businesses looking seeking funding through the USDA and any loan programs facilitated by HOTED.

KPI 2: Increase awareness within the business community of the funding available through the SBA and USDA.

KPI 3: Provide communities with information about other federal funding sources to support business growth, as they become available

KPI 4: Support communities wishing to create funding mechanisms at the local and regional level to support local businesses.

Goal 10: Develop tourism opportunities within the region

KPI 1: Create an inventory of all tourism and recreation assets.



KPI 2: Identify investments that need to be made in order to strengthen those assets or make them more accessible to tourists.

KPI 3: Prioritize those investments and create regional plans for making them.

KPI 4: Develop a tourism brand that makes it easy for people throughout the country to identify what is in the Heart of Texas region and why they should visit.

KPI 5: Create a marketing strategy with clear objectives for tourism attraction.

Goal 11: Foster key economic development catalyst projects

KPI 1: Support communities in their efforts to strengthen the regional healthcare sector through worker training and establishing additional facilities within Freestone and Bosque counties.

KPI 2: Support the expansion of avionics and air traffic control training programs at TSTC.

KPI 3: Support the expansion of composite materials research and testing within the region.

KPI 4: Support community efforts to attract additional investment in renewable energy.

KPI 5: Assist local jurisdictions in responding to site selection requests.

KPI 6: Educate local jurisdictions regarding economic development best practices, industry trends and new tools as they become available.

Goal 12: Foster inclusive business retention and expansion efforts

KPI 1: Maintain an updated database of all major employers within the region.

KPI 2: Support community development of Business Retention and Expansion Programs that can be implemented by local jurisdictions (includes training materials, tools and resources).

KPI 3: Provide information to local jurisdictions on BR&E best practices.

KPI 4: Support the creation of a regional Business Retention Day to occur annually

Goal 13: Inspire intentional management of environmental resources

KPI 1: Identify best practices for the management of environmental resources and disseminate them to local jurisdictions.

KPI 2: Provide communities with information on the funding mechanisms that can improve their resource management.

KPI 3: Engage in partnerships that promote improved management of environmental resources.

KPI 4: Serve as an information hub for local jurisdictions looking for information regarding resource management, best practices and funding opportunities.

Proposed Target Industries

- Advanced Manufacturing and Production
- Warehousing and Fulfillment Centers
- Aerospace & Defense
- Supply Chain Management/Distribution Hub
- Health Care
- Professional & Financial Services
- Tourism: Attracts more than 2MM visitors a year: <https://wacoheartoftexas.com/tourism-research-and-statistics/>

Focus on Innovation

Promote innovation and entrepreneurship within the Heart of Texas region as a means of further diversifying the economy, creating jobs and attracting additional investment. Recent successes like that of Magnolia Market at the Silos, demonstrate the power of homegrown companies to reshape the region and lead forward progress.

Waco was ranked seventh in the nation for mid-size cities with the most small business owners.¹⁹⁶

Existing support structures are in place to support entrepreneurship, such as Baylor University's department of Entrepreneurship and Corporate Innovation which has been rated in the top ten in the country by USA Today and the Princeton Review.¹⁹⁷ The university's Oso Launch program provides entrepreneurial students with guidance and the opportunity to raise capital to fund their ideas. They are extending their support into the community with the Community Entrepreneurship Program (CEP). The CEP program provides mentoring, education and training for local business owners. Baylor's entrepreneurial support programs extend to include the Baylor New Venture Competition, 1846 Business Incubator, and the Texas Family Business of the Year awards.¹⁹⁸



Survey of Economic Development Resources in The Heart of Texas Region

Economic Development Partners

State, County, and City Economic Development Agencies

- Texas Economic Development Corporation
 - Texas Governor's Office of Economic Development and Tourism
 - The Texas Film Commission
 - The Texas Music Office
 - Travel Texas
 - The Texas Workforce Investment Council
- The Texas Rural Health and Economic Development Advisory Council
- Texas Economic Development Council
- Texas Downtown Association
- Texas Travel Industry Association
- Heart of Texas Economic Development District, Inc
- Bosque County
 - Clifton Economic Development Corporation
 - Meridian Economic Development Corporation
- Falls County
 - Rosebud Economic Development Corporation
- Freestone County
 - Fairfield Economic Development Corporation
 - The Economic Development Corporation of Teague, Inc.
- Hill County
 - Hillsboro Texas Economic Development Corporation
 - Hubbard Economic Development
- Limestone County
 - City of Groesbeck Economic Development
 - Mexia Economic Development Corp
 - Kosse Economic Development Committee

- McLennan County
 - Bellmead Economic Development Corporation
 - McGregor Economic Development Corporation
 - Moody Economic Development Corp
 - City of Robinson Economic Development
 - City of Hewitt
 - Lorena Economic Development Corporation

Chambers of Commerce

- Bosque County Chambers of Commerce
 - Clifton Chamber of Commerce
 - Meridian Chamber of Commerce
 - Cranfills Gap Chamber of Commerce
- Falls County Chambers of Commerce
 - Marlin Chamber of Commerce
 - Rosebud Chamber of Commerce
- Freestone County Chambers of Commerce
 - Fairfield Chamber of Commerce
 - Teague Chamber of Commerce
- Hill County Chambers of Commerce
 - Hillsboro Chamber of Commerce
 - Hubbard Chamber of Commerce
 - Lake Whitney Chamber of Commerce
- Limestone County Chambers of Commerce
 - Groesbeck Chamber of Commerce
 - Mexia Chamber of Commerce
 - Thornton Chamber of Commerce



HEART OF TEXAS CEDS

- McLennan County Chambers of Commerce
 - Bellmead Chamber of Commerce
 - Cen-Tex African American Chamber of Commerce
 - Cen-Tex Hispanic Chamber of Commerce
 - Hewitt Chamber of Commerce
 - Lorena Chamber of Commerce
 - Mart Chamber of Commerce
 - McGregor Chamber of Commerce
 - Greater Robinson Chamber of Commerce
 - Greater Waco Chamber of Commerce
 - West Chamber of Commerce

USDA

- Marlin Office
- Hillsboro Office
- Waco Office

Rural Economic and Community Development

- Marlin Office
- Fairfield Office
- Hillsboro Office
- Groesbeck Office

Other Associations

- Waco Convention & Visitors Bureau
- Waco Downtown Neighborhood Association

U.S. Small Business Administration Small Business Development Centers

- McLennan SBDC at McLennan Community College
- Navarro SBDC, Fairfield Satellite
- Navarro SBDC, Mexia Satellite

Programs, Studies & Projects

Prosper Waco¹⁹⁹

Prosper Waco is an innovative approach to community work that consolidates and builds upon the efforts of existing nonprofits and community leaders. Our vision is a Greater Waco in which all people and institutions work together for the common good. To do this, we use the Collective Impact model, which brings together key leaders and organizations in the areas of education, health, and financial security to comprehensively:

- Identify and quantify challenges facing our community;
- Articulate a shared vision;
- Establish measurable goals;
- Facilitate implementation of strategies to address each challenge;
- Monitor progress against each goal;
- Share data and resources necessary to accomplish our collective goals; and
- Engage a broad spectrum of community partners (including recipients of services) in the design of its work.

By encouraging Collective Impact strategies among leaders in city and county government, businesses, nonprofits, healthcare, education, social services, foundations, and churches, the Prosper Waco initiative builds on and steadily increases the effectiveness of efforts that address community challenges. The strategy is to raise awareness among all members of the community, focus alignment of mutually reinforcing activities for more effective outcomes, and increase levels of engagement of individuals and organizations to bring about measurable and sustainable change in citizens' health, education and financial security.

The Heart of Texas Efficient Towns and Counties Co-op (HOTETC)²⁰⁰

Communities throughout the Heart of Texas region were experiencing common but serious challenges: slow or flat growth, fewer grant dollars, rising costs and increased complexity of water/sewer and other systems. County governments were also concerned about these issues, both in the towns and also the unincorporated areas and rural water supply systems.

The common issues and need to seek solutions brought conversations at the regional level with the Heart of Texas Council of Governments. Some needs were immediate and practical, such as improved knowledge and management of water and sewer systems. Other concerns were technical and required research, and still others were subjective and cultural, like how to engage more folks in the community.

In 2011 the region began looking for answers: communities started to put together the Efficient Towns & Counties Co-op, requested a planning grant, and pledged local dollars to kick off the project. The next year the group landed the grant and staffed the effort primarily using regional staff and contractors supplemented by technical experts. Compared to a turn-key, consultant-driven approach, this method cost less, strengthened local resources that could be tapped again over time, and leveraged deep familiarity with the region and its people. All the knowledge and tools secured by the grant will remain in the region so the cities and counties can build on them over time.

Opportunity Zones²⁰¹

The Heart of Texas region has 11 federally designated Opportunity Zones that offer tax advantages to investors and businesses choosing to locate in them. The zones are in Bosque, Falls, Hill, Limestone, & McLennan Counties. These Opportunity Zones create a unique opportunity for the region to attract additional investment. As a way for investors to obtain tax advantages, Opportunity Zones serve to incentivize investment in areas that have historically been economically depressed. These regions do exist within the region, but in order to attract investment, it is necessary to demonstrate how the combination of tax advantages, a central geographic location and region in transition can benefit investors looking to benefit from their investments.

Strategies to promote these Opportunity Zones include positioning them within the context of target industry marketing to site selectors. In this way, the Opportunity Zones serve as an advantage for selecting a particular location, rather than the single driver to it. Given how competitive Opportunity Zones are, this type of positioning is beneficial for economic developers.

Additional marketing communication should be directed towards the businesses already present within the region. Businesses who have other locations elsewhere or who are looking to expand, should be made aware of these Opportunity Zones and the tax advantages they can experience by choosing to expand within them.

Local investors and entrepreneurs should also be educated about the presence of Opportunity Zones within the community and how they can be leveraged to attract additional capital and grow companies.



Bosque County

Bosque County²⁰² has one opportunity zone that includes the city of Meridian:



Falls County

Falls County²⁰³ has one opportunity zone which includes part of the city of Marlin:



Hill County

Hill County²⁰⁴ has two opportunity zones which include part of Hillsboro, and all of Itasca and Covington:



Limestone County

Limestone County²⁰⁵ has two opportunity zones which includes part of Mexia and all of Groesbeck:



McLennan County

McLennan County²⁰⁶ has five opportunity zones. Three are in the City of Waco, two of which border the Baylor University campus while, Hallsburg, Riesel and West are within or partially within opportunity zones:

Disaster Preparedness and Resilience

Existing Programs and Projects

COVID-19 Response

The Heart of Texas region has worked collaboratively to address challenges presented by COVID-19. While the economy was impacted by COVID-19, the Heart of Texas region only accounted for 1.6% of all confirmed cases in the State of Texas as of December, 2020.²⁰⁷

Several programs took place during the COVID-19 pandemic that demonstrate the Heart of Texas region's resilience and ability to work together during times of crisis:

- The First Presbyterian Church donated \$10,000 to the Chamber of Commerce to support small business loans in the community.
- The Chamber and Main Street program organized and started a Raising Hill campaign on Facebook, which created a central location for businesses to market to the community and surrounding areas. Local residents were urged to spend money at a local business that remained open at least once a week.
- Two Sisters Ceramics and Makley Rehab put together DIY kits for children to make at home.
- The local coffee shop, Overflow, started offering take-and-bake meals.
- Skips Irish Pub offered patrons the opportunity to fill their own growler and family style meals to go.
- Drift Away Day Spa offered yoga classes online via Zoom.
- Producer's Co-op and Fleming's Ace Hardware both developed a contactless pickup system.
- One of the local industrial plants, Gate Precast, purchased some gift certificates from local restaurants to give as employee appreciation gifts since they were considered essential and continued working the entire time.



2020 NADO Impact award²⁰⁸

- The Area Agency on Aging of the Heart of Texas (AAAHOT), a program in the Health & Human Services Division of the Heart of Texas Council of Governments (HOTCOG):
 - Funded the purchase of non-perishable groceries for financially disadvantaged individuals age 60 and older living in the rural areas of the HOTCOG six-county service area during the early stages of the COVID-19 pandemic.
 - Approximately 800 families had boxes of non-perishable groceries valued at \$100 delivered to their homes at no cost through the efforts of a network of staff, administrators, elected officials, and volunteers .
 - Originally, \$80,000 was committed to the program, but local suppliers (HEB Grocery, Brookshire Grocery, Sam's Club and Packless Corporation of America) partnered to extend the value of the contribution during this time of food shortage.
 - The program ended up delivering approximately 75 tons of food to families in need.

Organizations:

- Heart of Texas Council of Governments;
- County Judges from Bosque, Falls, Freestone, Hill, Limestone, and McLennan Counties;
- Flat Rock Trailers;
- HEB Grocery;
- Brookshire Grocery;
- Sam's Club;
- Packless Corporation of America;
- Hill County Community Coalition and
- other volunteers



Preparing for a Future Pandemic Response

To better prepare for future pandemics, the Heart of Texas COG should work with local jurisdictions to create a pandemic response action plan that includes methods of communicating internally, sharing information with the public and establishing a coordinated response to containing the pandemic, treating it and preventing it. These plans need to include the following:

- How to serve the elderly, disabled, and those at-risk for hunger or displacement
- Sheltering those impacted (or infected) by the pandemic
- Feeding the population
- Care of pets, service and support animals
- Distribution of emergency supplies
- Mass evacuee support
- Mass emergency assistance support
- Support for the homeless
- Non-traditional means of supporting 911 callers in times of greater need
- Continuity of operations and services

Resources that used to guide the creation of this action plan include:

- Mass Care/Emergency Assistance Pandemic Planning Considerations by FEMA
- COVID-19 Response and Homelessness: An Action and Resource Guide by HUD
- COVID-19 Best Practices Information Considerations for People with Disabilities by FEMA

Heart of Texas COGs should also facilitate training at the local level by providing access to training programs and webinars offered by emergency management experts and universities. This could include the following:

- Demobilization in a Pandemic webinar hosted by Louisiana State University, Academy of Counter-Terrorist Education
- Breaking the Chain: Preventing the Spread of Surface Contamination webinar hosted by Louisiana State University, Academy of Counter-Terrorist Education
- Emergency Preparedness for Small Businesses During COVID-19 a webinar delivered by the New Jersey Business and Industry Association and FEMA
- First Responder PPE Guidelines webinar hosted by Louisiana State University, Academy of Counter-Terrorist Education
- EOC Operations During Social Distancing webinar hosted by Louisiana State University, Academy of Counter-Terrorist Education
- Continuity: Why You Should Care and How We Can Help webinar hosted by FEMA

Diversification of the Energy Sector

Historically, the Heart of Texas region was heavily dependent on jobs and revenue from coal, oil, and gas. Recently, however, there has been a shift away from fossil fuels, and the closure of Big Brown Coal plant left the region with an economic gap. Heart of Texas has shown its resilience by swiftly capitalizing on its abundant source of renewable energy from Solar and Wind Farms. There is land to build these farms, and the result will be a smaller carbon footprint and better air quality for the residents. Additionally, jobs will be created, the farms will provide a less expensive alternate source of energy, and tax revenue will help fund schools in the region, creating a better quality of life for growing families in the region.

Current additions include:

- **Wind**
 - Engie, in Limestone and McLennan²⁰⁹
 - Prairie Hill Wind Farm project²¹⁰ in McLennan and Limestone
- **Solar**
 - Cypress Creek Renewables in Robinson²¹¹
 - Hecate Energy LLC in Falls²¹²
 - Eddy II in Bruceville-Eddy²¹³
 - OCI Solar Power in Falls²¹⁴
- Glory Leasing in McLennan and Bosque²¹⁵

Strategies to Enhance Resiliency

Economic resilience is the ability to prevent, withstand, and quickly recover from disruptions to the economy. The most common types of disruptions include downturns in economy or in a key industry; the closure or exit of a major employer; and natural or man-made disasters. Creating a resilient economy requires the ability to anticipate risk, evaluate how risk can impact economic assets, and building the capacity respond to disruptions.²¹⁶

Too heavy a reliance on one industry or employer puts a region at risk of economic downturn in the event of the exodus of an industry or employer. This is evident with the exodus of coal, oil and gas from the Heart of Texas region, which left the area with high unemployment and no immediate solution for replacement of jobs and revenue. Economic diversity is necessary to not only provide innovative and new opportunities to the region, but to safeguard against economic downturn.

Innovation is linked with business and economic growth. According to the StatsAmerica Innovation 2.0 Comparison,²¹⁷ The Heart of Texas Council of Governments region under indexes in terms of innovation, with an index score of 95.7. Compare this with the Permian Basin Regional Planning Commission, with an index score of 128.8. In 2017, The Midland Development Corporation²¹⁸ in Texas stimulated their economy and expanded the diversity of the business landscape by creating the Midland Entrepreneurial Challenge, in partnership with the local University, University of Texas Permian Basin. By investing in their own citizens and encouraging entrepreneurs to open their businesses in Odessa, they were able to award \$600,000 to ten businesses. Those ten businesses have grossed over \$7.4 million

in taxable revenue and created or retained 53 full-time jobs and 12 part-time jobs. Of the participants of this initiative that were not awarded winning funds, 21% went on to start or expand their business by acquiring other capital funding. The Permian Basin region now attracts venture capital, which continues to reap economic benefits throughout the region.

Heart of Texas has an opportunity to partner with Baylor University and other regional institutions, not only to offer workshops and seminars to give business owners the tools they need to build a successful enterprise, but to tap into the wealth of knowledge from students and recent graduates. Additionally, the large amount of STEM degrees awarded through the local colleges and universities already provide a knowledge base ripe for innovation.

Below are some economic resilience strategies based on investment in entrepreneurs and small businesses, which will diversify the economy and bring jobs and revenue to the region.

Entrepreneurial Pursuits

Economic²¹⁹

- Invest in entrepreneurs and small businesses, by creating an entrepreneurial challenge, in partnership with Baylor University, to attract recent graduates to remain and invest in the region.
- Attract venture capital through Angel Investors to fund entrepreneurial aspirations.
- Invest and create more Small Business Development Centers (SBDCs).
 - SBDCs enhances economic development by providing small businesses with management and technical assistance. Currently, the Heart of Texas region has three SBDCs, in association with McLennan Community College and Navarro College.
- Create business incubators that can be used by community members²²⁰
 - Business incubators, as economic tools, have been increasingly common in the last decade and a half for stimulating local development. Incubators provide facilities and services (for example, business planning and legal, accounting, and marketing support) to catalyze small-business growth. In fact, incubated companies have a dramatically higher rate of survival than an average startup does.

Infrastructure Systems²²¹

- Ensure residents have access to high-speed internet connections. Much of business, and most current innovations rely in the internet to function, and currently the Heart of Texas region lags behind access to this resource with an index of 63.7.²²²

Natural and Cultural Resources²²³

- Invest in Diversity. Attracting a diverse demographic population allows a region to tap into a variety of skills, knowledge, and services that expand economic diversity. Increased creativity, better ideas and better overall productivity are among the commonly cited performance benefits of a diverse workforce. Employees from different backgrounds usually have different perspectives on dealing with problems or confronting creative opportunities, enhancing the quantity and quality of ideas presented.²²⁴

Two significant disruptions to the Heart of Texas region were the onset of the COVID-19 pandemic and the shift from energy sources like coal, oil, and gas, resulting in the loss of an industry and jobs. The following explains specific interventions regarding community planning and capacity building, economic, health and social services, infrastructure systems, and natural and cultural resource factors that can make the Heart of Texas region more economically resilient.



COVID-19

Community Planning and Capacity Building²²⁵

- Enhance access to broadband to ensure that residents can work from home and go to school from home
- Identify the aged, immune compromised, or those with underlying health conditions
- Identify, gather, and communicate resources for help to those affected
- Identify stakeholders and resources they can offer to the community
- Pool resources to provide planning technical assistance, staffing resources and funding
- What funds, supplies, and supplemental resources are available?
- What skillsets can we tap into to mitigate or address disaster? This includes healthcare workers, and job placement services.
- Define local capacity building needs and identify post-disaster resources to fill those needs.
- Create guidance, training, and other materials, and make available to all stakeholders.²²⁶

Economic

- Identify individuals impacted financially and offer economic guidance, resources and support, including, but not limited to, where to file for unemployment, temporary employment options, access to food.
- Explore alternative means for businesses to remain open, for instance curb-side pick-up and to-go options for food.
- Attract e-commerce distribution and fulfillment facilities. E-commerce has grown since the pandemic began and sees no signs of diminishing, even after the pandemic is over. Capitalize on this moment and advertise the central location of Heart of Texas as a selling factor.

Health and Social Services²²⁷

- Identify cohort in need of health services, and determine capacity for providing care and services.
- Partner with regional services to supplement deficiencies.
- Develop a marketing and communication plan to inform residents how to stay safe and avoid contracting the virus, enforce these policies.

Housing²²⁸

- Ensure those who are at risk of eviction due to unemployment or sustained illness have resources to avoid or stave off losing their home.
- Build close knit communities who are able to support those impacted by COVID, including providing grocery delivery for those in quarantine.

Infrastructure Systems²²⁹

- Create a digital contact tracing system to notify residents of potential exposure.

Energy Sector

Community Planning and Capacity Building²³⁰

- Identify those who would be impacted by the exodus of an industry.
- Identify ways to combat the exit of an industry or comparable substitutions to replace those industries.
- Involve all stakeholders, from government organizations to private sector in recovery planning.
- Ensure that the prominent industries attracted to the region are resilient and adaptable sectors, not subject to extinction.
- Know what incentives a community can feasibly offer to replace the loss of jobs.
- Pool resources to provide planning technical assistance, staffing resources and funding.
 - What funds are available?
 - What skillsets can we tap into to mitigate the damage of significant job loss?
- Define local capacity building needs and identify post-disaster resources to fill those needs.
- Create guidance, training, and other materials, and make available to all stakeholders.

Economic²³¹

- Identify individuals impacted financially and offer economic guidance, resources and support, including, but not limited to, where to file for unemployment, temporary employment options, access to food.
- Create partnerships to skill up or cross train the labor force to meet future workforce needs for those impacted by job loss.
- Provide financial resources to aid in securing grants, loans, or other financial help.
- Provide financial incentives to attract businesses to the region, and recruit those businesses.

Health and Social Services²³²

- Identify impacted cohort and disseminate guidance, resources and support, including, but not limited to, access to food and other supplemental help, access to healthcare.

Housing²³³

- Ensure those who are at risk of eviction due to unemployment have resources to avoid or stave off losing their home.
- Create or rehabilitate housing to attract new workers to the new jobs.

Infrastructure Systems²³⁴

- Ensure that the region has the infrastructure necessary to attract, accommodate, and retain new energy sources, for instance, substations should be kept in good working order.
- Ensure taxes and regulations aren't prohibitory for companies to enter the region.
- Identify undeveloped land that currently has access to utilities needed for manufacturing, production, or distribution facilities.
- Invest in initiatives to enhance freight mobility in the region.
- Invest in public transportation so workers can access their new jobs without reliance on a car.

Natural and Cultural Resources²³⁵

- Ensure that new energy farms don't deplete natural and resources.



Evaluation Framework

This CEDS report utilized government data from various sources including U.S. Census Bureau, American Community Survey, Bureau of Labor Statistics, National Center for Education Statistics, U.S. Department of Energy, StatsAmerica, and the Internal Revenue Service, as well as local data sources including Texas Demographic Center, Texas Department of State Health Services, Texas Workforce Commission, and Texas Labor Market Information. Additional information was retrieved from various news sources and local Economic Development websites, including Heart of Texas Economic Development District, Fairfield Texas Economic Development the Greater Waco Chamber. The report used the most up-to-date data available, and to the best ability, ensured that parameters of different metrics coincided to ensure the best possible comparisons.

Data that described the current state of the Heart of Texas region were chosen focusing on demographic and socioeconomic data, population, age, race/ethnicity, sex, and special groups, workforce, employment and unemployment, industries, environmental, geographic, climatic, and cultural resources, infrastructure assets and other factors affecting economic performance, including housing metrics and educational attainment. The goal is to compare the metrics listed above that describe the current state of the Heart of Texas region, with metrics in 2025, to determine the success of the 2020-2025 CEDS.

Performance Measures Include:

- Number of jobs created or retained in the region
- Population changes
- Attraction of a younger workforce
- Lower unemployment rates and higher labor force participation
- Increased levels of educational attainment
- Introduction of new, sustainable industries
- Environmental impact
- Infrastructure investments
- Amount of private investment in the region
- Number of business formations and expansions in the region
- Regional median income change
- Number of people receiving job training in the region
- Business starts



Appendix

County-Level SWOT

Bosque

Demographic Summary

- Population has been steadily declining and Texas population projections predict a decline in population in the region over the next 30 years.
- Fully one-quarter of the residents are of retirement age, and the median age is 12 years higher than the state median age.
- 52% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%).

Economic Summary

- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Bosque County has seen a decrease in the labor force from October 2019-2020 (-114) and an increase in unemployment, although the rate is lower than the Heart of Texas region and the State of Texas.
- Educational services, and health care and social assistance employ the most individuals in Bosque County, while Information jobs provide the highest wages.
- Proximity to DFW Metroplex
- High median wage compared to the region; second highest among all counties
- Strong local small business climate

Sources of economic growth

- Tourism and weekend-home economies from beautiful scenery
- Arts community and wineries

Sources of economic challenge

- Older population
- Low industrial base
- Coal, oil, and gas leaving the region
- No population centers
- Low educational attainment



Needs

- Housing
- Community development
- Workforce development
- Infrastructure
- Water supply
- Transportation enhancements
- Improved internet access

Unemployment over time:²³⁶

- Population: 18,882
- UI Claimant Count: 164

Top 5 UI Claim Industries

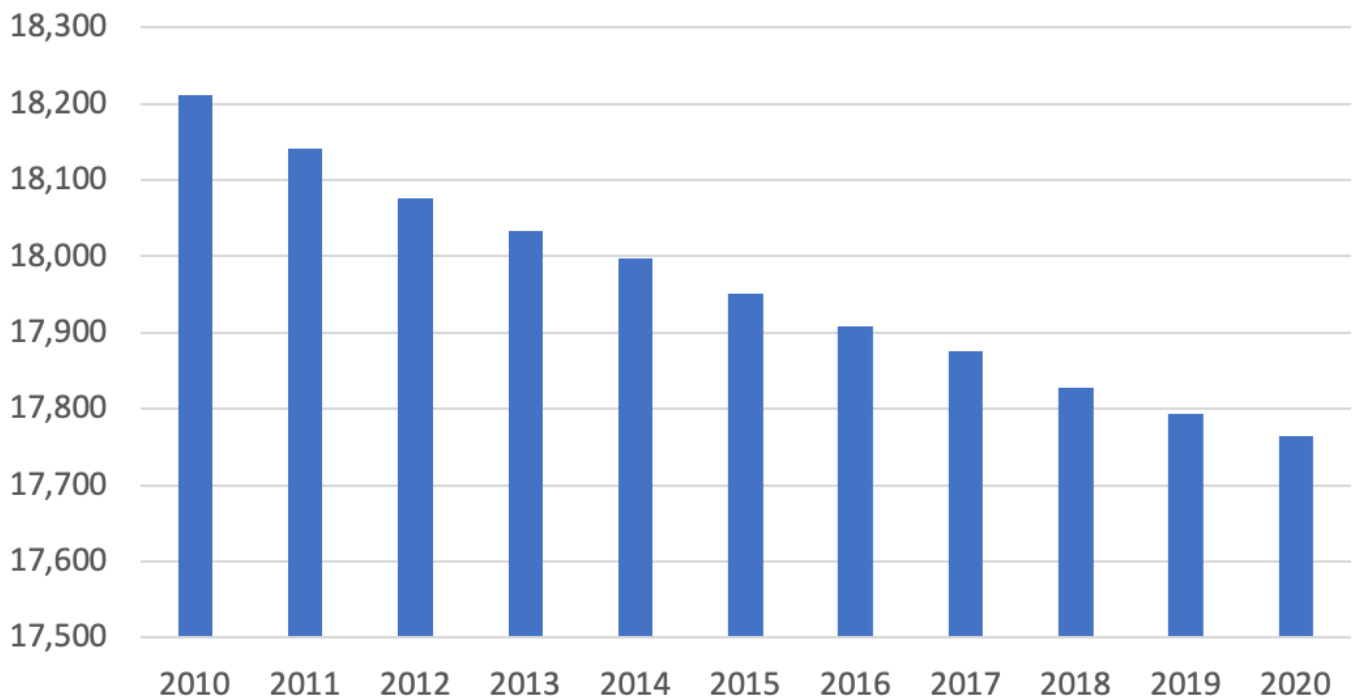
1. Oil and gas pipeline construction
2. Temporary help services
3. Nursing care facilities, skilled nursing
4. Full-service restaurants
5. Commercial machinery repair and maintenance

	Employment October 2020 ²³⁷	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Bosque	7,872	8,101	8,260	8,374
Heart of Texas	159,427	161,035	168,742	166,398
	Unemployed October 2020	Unemployment October 2020	Unemployed October 2019	Unemployment October 2019
Texas	968,200	6.9	497,108	3.5
Bosque	388	4.7	273	3.3
Heart of Texas	9,315	5.5%	5,399	3.2%



Facts:

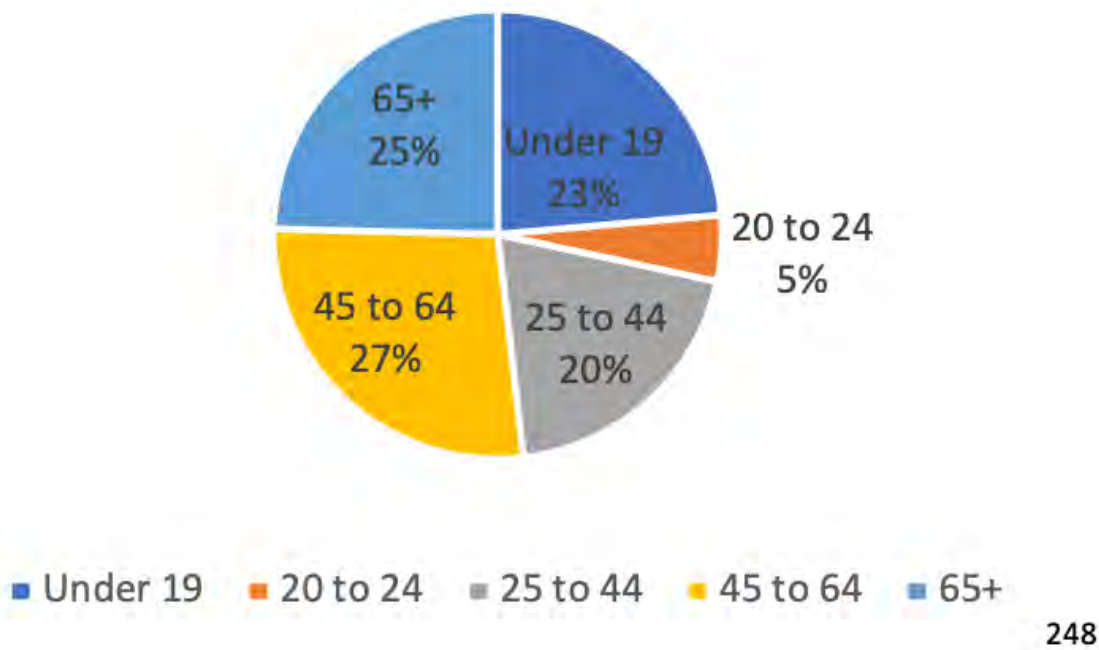
- Current Population:²³⁸ 18,296 (5th most populous county in the Heart of Texas region)
- Median Household Income: \$50,882 (+/-2,214)²³⁹
- Median Age:²⁴⁰ 46.6 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 57.3%²⁴¹ (61.2% in Texas, 61.7% in U.S.)²⁴²
- Student to teacher ratio: 10.8 (or 11 to 1)²⁴³
- Percent of children under age 18 in poverty: 19.7%²⁴⁴
- Percent of students enrolled in free or reduced lunch: 62%²⁴⁵

Population over time:²⁴⁶**Bosque****Age Distribution**²⁴⁷

- Fully one-quarter of the residents are of retirement age, and the median age is 12 years higher than the state median age
- 52% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%)

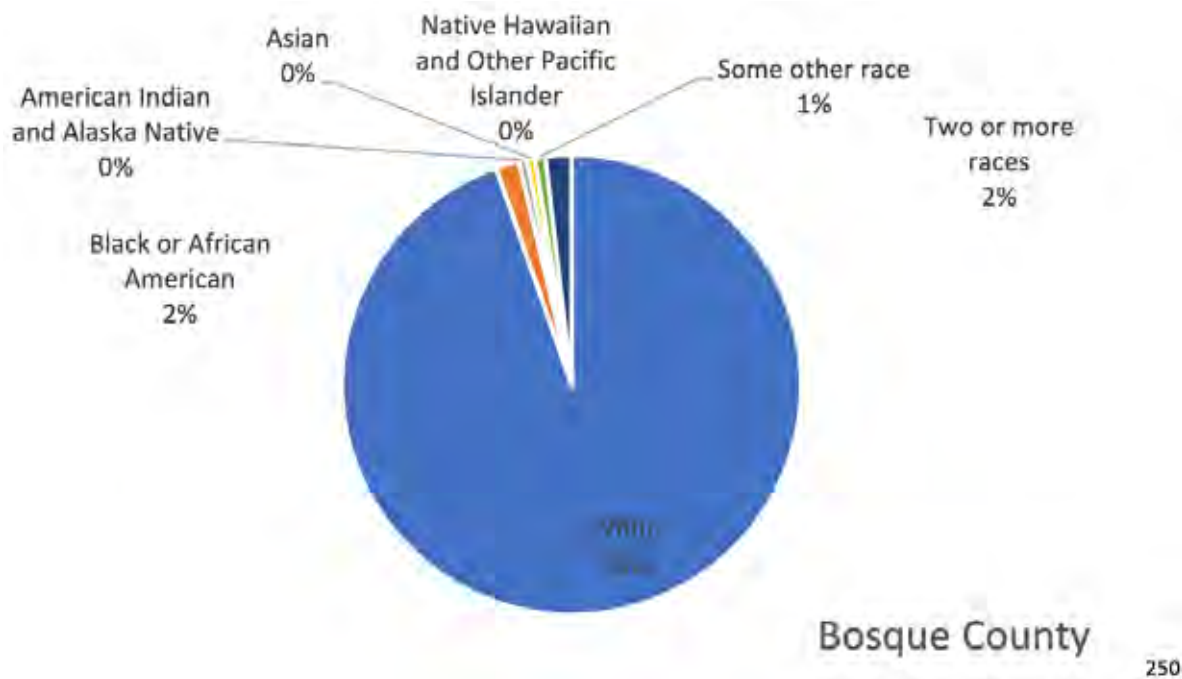


Bosque County



Race/ethnicity distribution²⁴⁹

- Bosque County is 95% white, showing little diversity



Housing²⁵¹

- More than 25% of housing in Bosque County is vacant

	Texas	Bosque	Falls	Freestone
HOUSING OCCUPANCY				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
HOUSING OCCUPANCY				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Bosque county has a lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

Economic Distress Criteria²⁵²

- Bosque county has the highest threshold calculation for Per Capita Personal Income at 75%

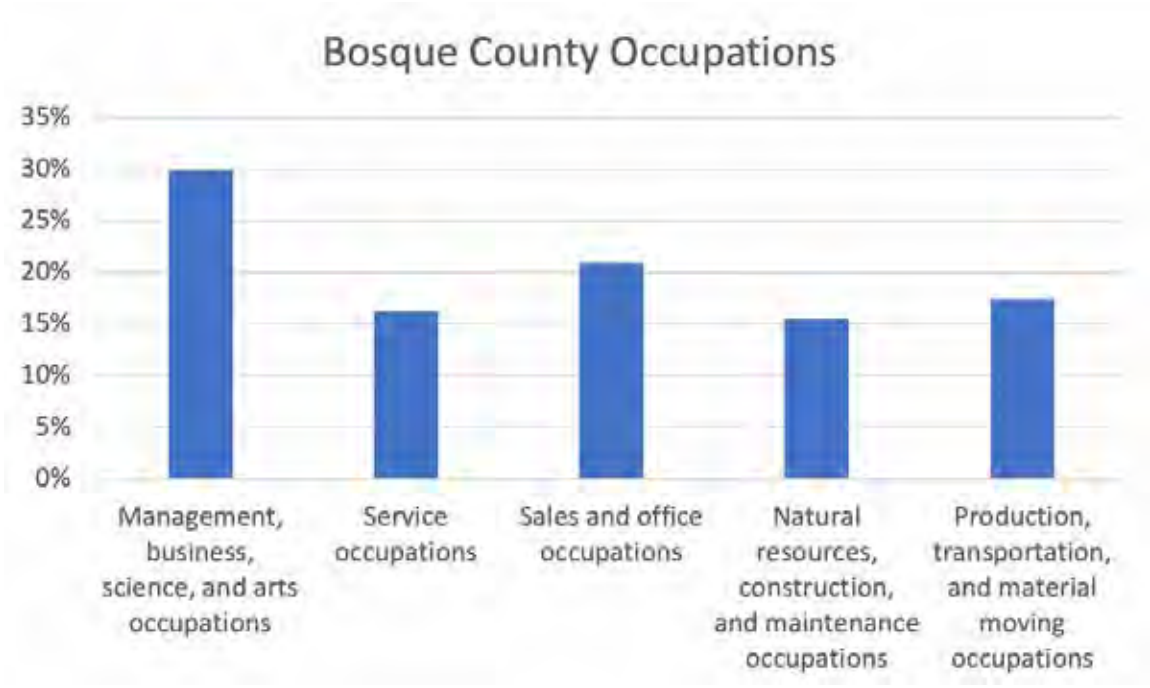
Economic Distress Criteria–Geographic Components

	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

The following chart shows percent of total employment and earning by industry

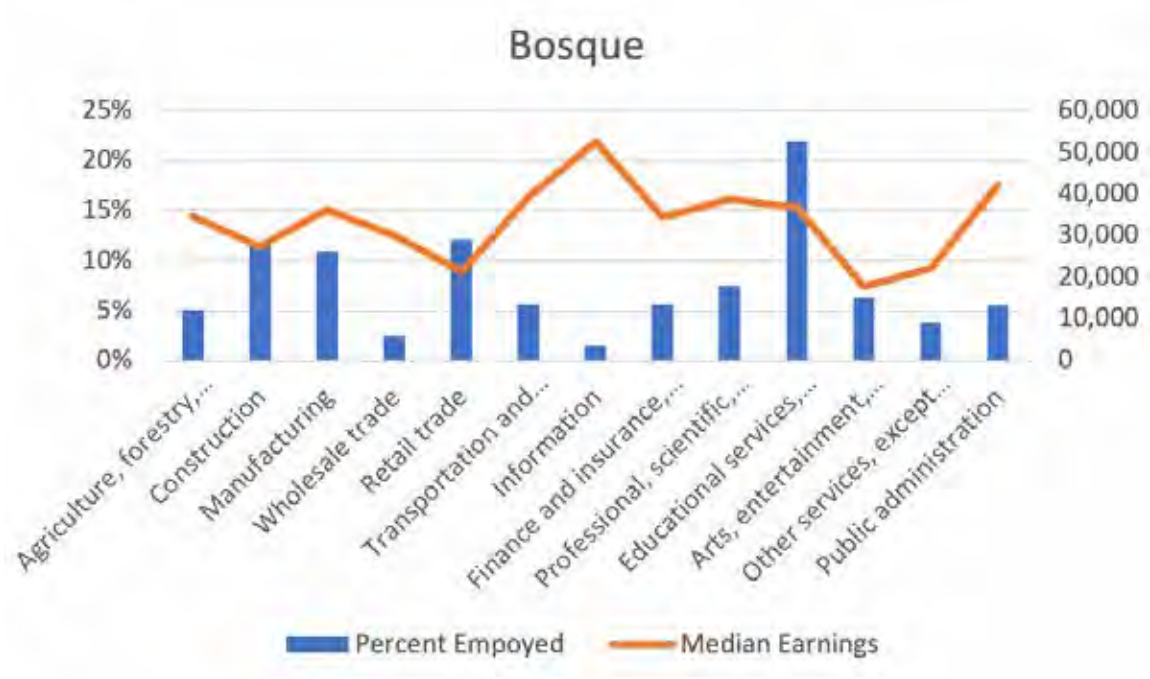
- Educational services, and health care and social assistance employ the most individuals in Bosque County, while Information jobs provide the highest wages.





Glory Leasing, LLC²⁵³

- Announced a new solar farm to the Central Texas area.
- Divided evenly between McLennan and Bosque Counties, this \$130MM+ solar project is expected to generate over 161 MW.
- Construction is projected to begin Q2 2020 with completion scheduled late 2022.
- Over 430 MW of renewable energy production be added to the state electric grid, annually.



Falls

Demographic Summary

- Population has been steadily declining and Texas population projections predict a decline in population in the region over the next 30 years.
- Majority of employment falls under Production, transportation, and material moving occupations and Management, business, science, and arts occupations.

Economic Summary

- Falls County has seen an increase in the labor force from October 2019-2020 (+118) and an increase in unemployment, although the rate is lower than the Heart of Texas region and the State of Texas.
- Labor participation is very low: 49.3%²⁵⁴ vs. 61.2% in Texas, 61.7% in U.S.²⁵⁵
- Highest poverty rate in the region, more than 80% of students are enrolled in free lunch programs.
- Educational services, and health care and social assistance and manufacturing employ the most individuals in Falls County, while transportation and warehousing, and utilities jobs provide the highest wages.

Sources of economic challenge

- Post-agricultural economy with relatively low-skilled workforce and low median wage
- Highest poverty rate in the region
- Low labor force participation rate
- Low educational attainment (12% have a BA or higher, vs. 29% State of Texas)
- Decaying infrastructure
- Low educational attainment

Needs

- Community development
- Infrastructure
- Workforce development
- Improved internet access

Unemployment over time:²⁵⁶

- Population: 17,346
- UI Claimant Count: 85

Top 5 UI Claim Industries

1. Oil and gas pipeline construction
2. School and employee bus transportation
3. Support activities for oil and gas operations
4. Employment placement agencies
5. Correctional institutions



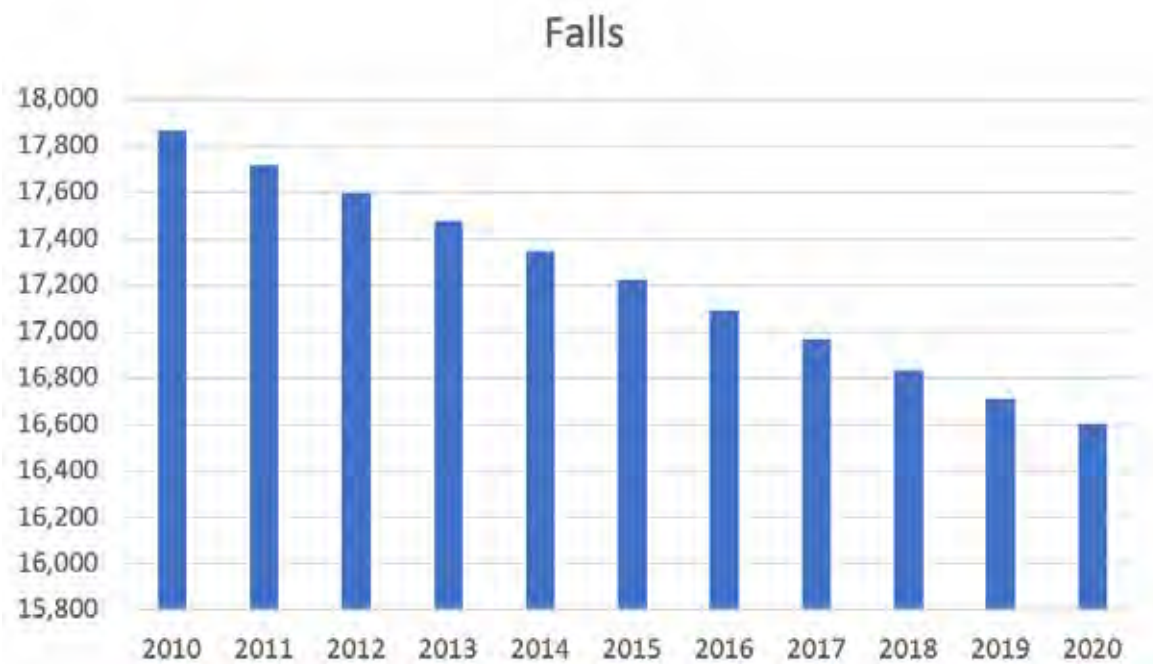
HEART OF TEXAS CEDS

	Employment October 2020 ²⁵⁷	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	Unemployed October 2020	Unemployment October 2020	Unemployed October 2019	Unemployment October 2019
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

Facts:

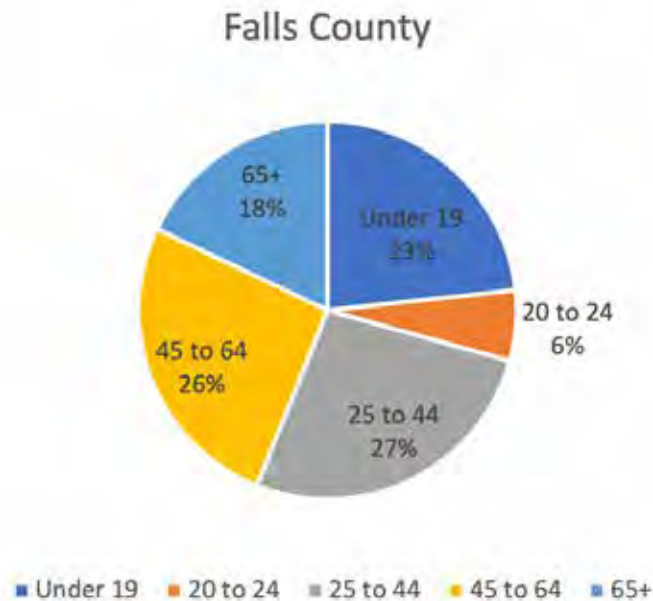
- Current Population:²⁵⁸ 17,272 (least populous county in the region)
- Median Household Income: \$38,032 (+/- \$3,400)²⁵⁹
- Median Age:²⁶⁰ 39 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 49.3%²⁶¹ (61.2% in Texas, 61.7% in U.S.)²⁶²
- Student to teacher ratio: 12.5 (or 12 to 1)²⁶³
- Percent of children under age 18 in poverty: 28.1%²⁶⁴
- Percent of students enrolled in free or reduced lunch: 82%²⁶⁵

Population over time:²⁶⁶



Age Distribution²⁶⁷

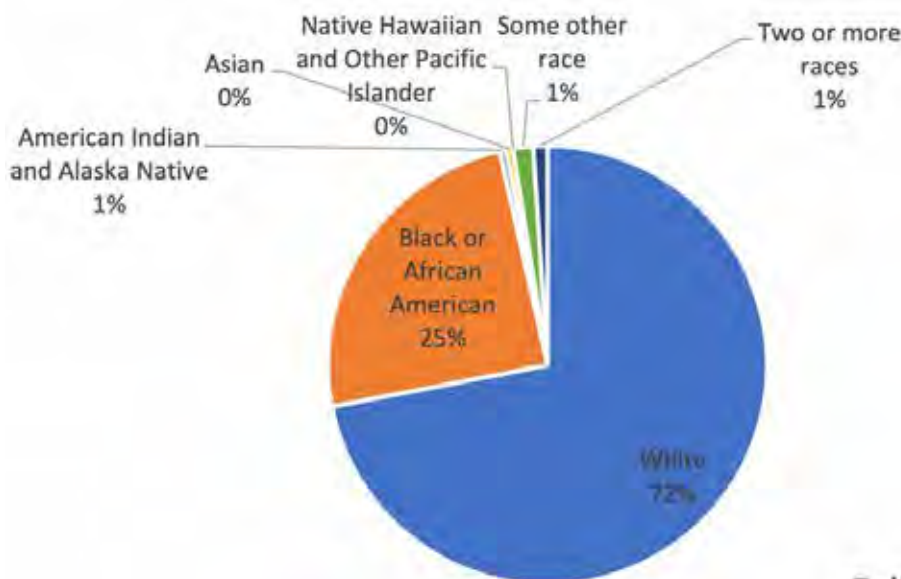
- Fewer than 20% of the residents are of retirement age, and the median age is slightly higher (39) than the state median age (34.6)
- 59% are of working age (20-64); on par with the region (56%), and equal to the state (59%)



268

Race/Ethnicity Distribution²⁶⁹

- Falls County has twice the percentage of Black residents compared to the Heart of Texas region and the State of Texas (25% vs. 14% vs. 12%), but is otherwise predominantly White.



Falls County

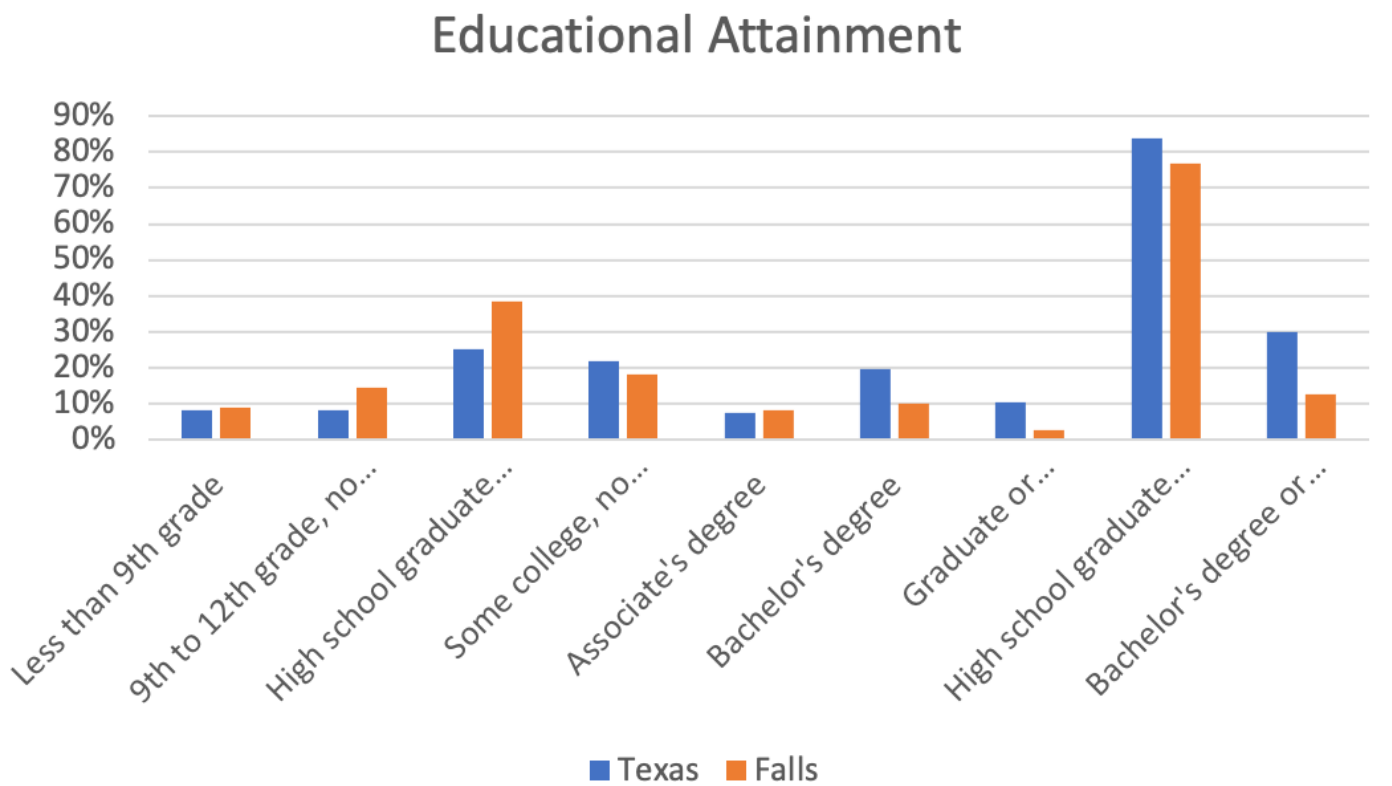
270

Housing²⁷¹

- More than 30% of housing in Falls County is vacant

	Texas	Bosque	Falls	Freestone
HOUSING OCCUPANCY				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
HOUSING OCCUPANCY				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Falls county has a significantly lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

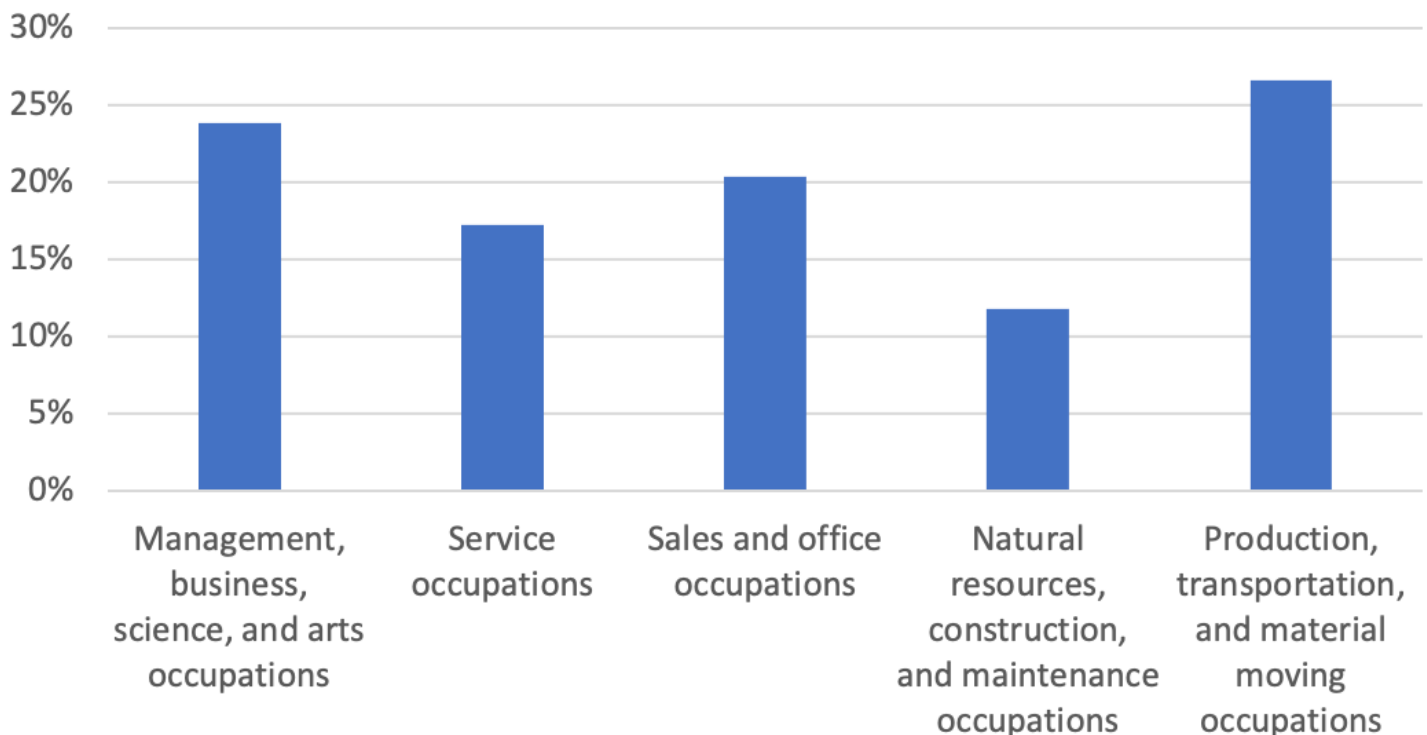


Economic Distress Criteria:²⁷²

- Falls county has the lowest threshold calculation for Per Capita Personal Income at 62.4%.

Economic Distress Criteria–Geographic Components

	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

Falls County Occupations

The following chart shows percent of total employment and earning by industry.

- Educational services, and health care and social assistance and manufacturing employ the most individuals in Falls County, while transportation and warehousing, and utilities jobs provide the highest wages.



Falls



OCI Solar Power²⁷³

A San Antonio-based developer is planning a 100-megawatt (MW) solar farm in Falls County. “Project Corona” will fill an 800-acre plot of land leased from private owners. It’s slated to begin construction in October with completion scheduled for November 2021.

- OCI Solar Power is planning a \$104 million solar farm in Falls County.
- 800 acres from private landowners in the reinvestment zone where it plans to build a 100-megawatt farm.
- OCI is looking for a 10-year, \$3.2 million tax abatement from the Chilton Independent School District in exchange for the \$104 million investment. Chilton ISD would receive \$573,000 — about 15% of what the company would pay.
- OCI only plans on hiring one person at an annual wage of \$48,000 once the project is operational in 2022.

Hecate Energy LLC²⁷⁴

- \$500 million, 500-megawatt solar farm in Falls County
- The project will place 1.6 million solar panels across 6,000 acres in the Mart and Riesel Independent School Districts, with most of them in the former.
- It will be among the largest solar projects nationwide.
- Construction will begin in February 2021 and wrap up in May 2022.



Freestone

Demographic Summary

- Population has been slightly declining, and Texas population projections predict a decline in population in the region over the next 30 years.

Economic Summary

- Freestone County has seen a decrease in the labor force from October 2019-2020 (-160) and an increase in unemployment; this county is the only county to have a higher unemployment rate than the Heart of Texas region *and* the State of Texas.
- This county was economically stable but due to being heavily concentrated in oil and gas, Freestone County has seen a downturn with closing of major coal plant, Big Brown. Risk of a population exodus if economy does not diversify and provide jobs.
- Labor Force participation is very low; should be addressed: 39.3%²⁷⁵ (61.2% in Texas, 61.7% in U.S.)²⁷⁶
- Majority of employment falls under Management, business, science, and arts occupations and Service occupations.
- Educational services, and health care and social assistance and Manufacturing employ the most individuals in Freestone County, while transportation and warehousing, and agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.

Sources of economic growth

- Access to 1-45 freeway expansion & US 84
- Has diversified manufacturing companies employing more than 4,500 people in the target Industry clusters.
- New acquisitions to Fairfield industrial park will replace some of the jobs lost from Big Brown Plant closure, including entry of Blackledge in March 2021.
- Robust incentives, including:
 - Land cost reductions or grants
 - Cash grants for Equipment & Infrastructure
 - Assistance with costs of infrastructure and utilities necessary to develop a property or establish the business
 - Assistance with workforce training and development through our Navarro College Career & Technical Center
 - Ad-Valorem Taxes
 - Sales Tax Grants
 - Construction Sales Tax
 - Building and Utility Connection Fees
 - Expedited and hassle free development review
 - Freeport Tax Exemption
 - Workforce Assistance
 - Small Business Focus
 - Texas Enterprise Zone Program

Sources of Economic Challenge:

- A rapidly declining industry is leaving faster than a new industry can be introduced to the area.
- High median wage- mostly due to oil and gas jobs, which are exiting the county
- Homogeneous economy- need for diversification
- No population center

Needs

- Entrance of a new industry, for instance, manufacturing, renewable energy, and transportation/warehousing.
- Water supply
- Improved internet access
- Airport

Unemployment Over Time:²⁷⁷

- Population: 20,472
- UI Claimant Count: 101

Top 5 UI Claim Industries

1. Oil and gas pipeline construction
2. Nursing care facilities, skilled nursing
3. Elementary and secondary schools
4. General medical and surgical hospitals
5. Limited-service restaurants

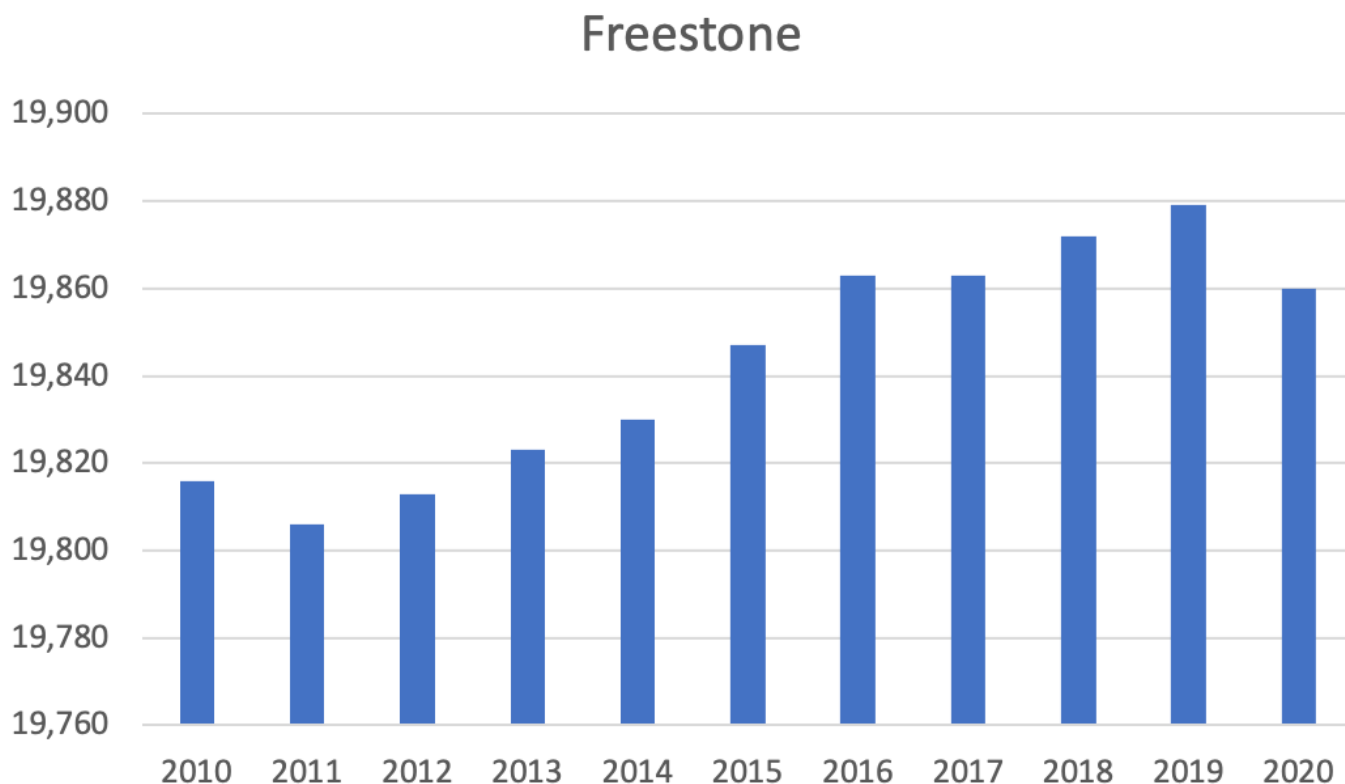
	Employment October 2020 ²⁷⁸	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	Unemployed October 2020	Unemployment October 2020	Unemployed October 2019	Unemployment October 2019
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

- Freestone has lost at least 350 (-40%) jobs since 2015 in the Mining, Quarrying, And Oil and Gas Extraction Industry, as a result of plants closing in the area.²⁷⁹
 - The entire state of Texas is losing jobs in this industry, albeit at a slower pace than Freestone, with a loss of 28,280 jobs, or -10%.
 - More than 100 indirect jobs have been lost as a result of the closure of the plants and mines.
- Nineteen of the top 25 industries in Freestone County have seen a decline in jobs numbers, six of which are jobs related to the Oil and Gas Industries.²⁸⁰

Facts:

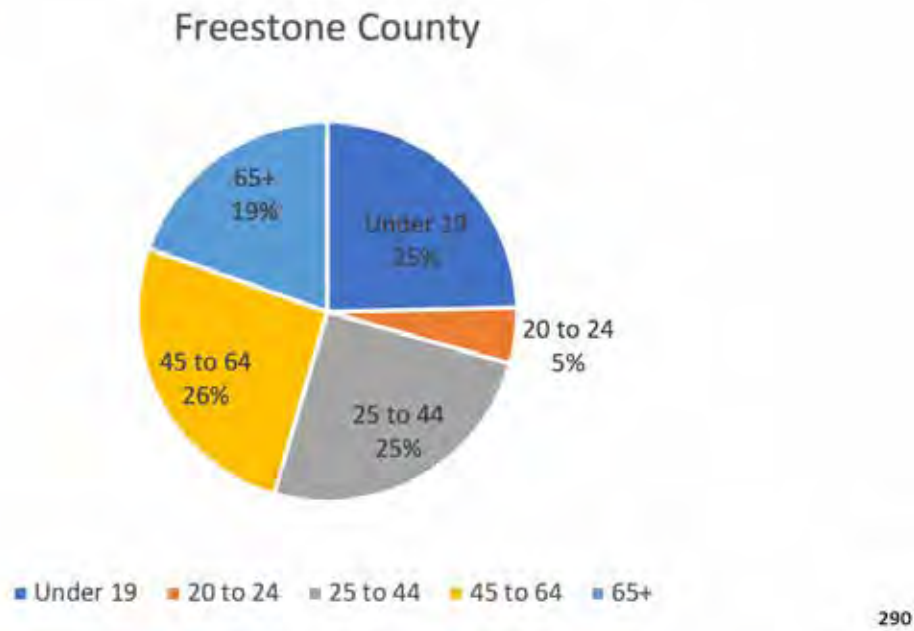
- Current Population:²⁸¹ 19,714 (4th most populous county in the region)
- Median Household Income: \$48,731 (+/- \$5,100)²⁸²
- Median Age: 41.5 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 39.3%²⁸³ (61.2% in Texas, 61.7% in U.S.)²⁸⁴
- Student to teacher ratio: 12.4 (or 12 to 1)²⁸⁵
- Percent of children under age 18 in poverty: 19.5%²⁸⁶
- Percent of students enrolled in free or reduced lunch: 54%²⁸⁷

Population over time:²⁸⁸



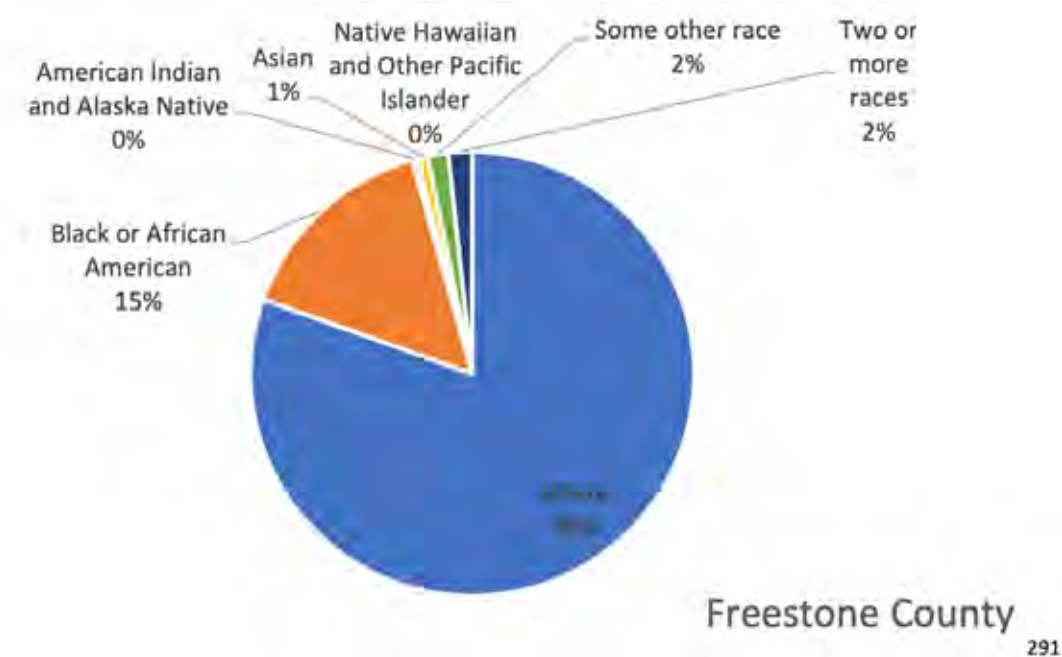
Age Distribution²⁸⁹

- Fewer than 20% of the residents are of retirement age, and the median age is higher (41.5) than the state median age (34.6).
- 56% are of working age (20-64); equal with the region (56%), and on par the state (59%).



Race/Ethnicity Distribution

- Freestone County is predominantly White, and its demographics are on par with the region.



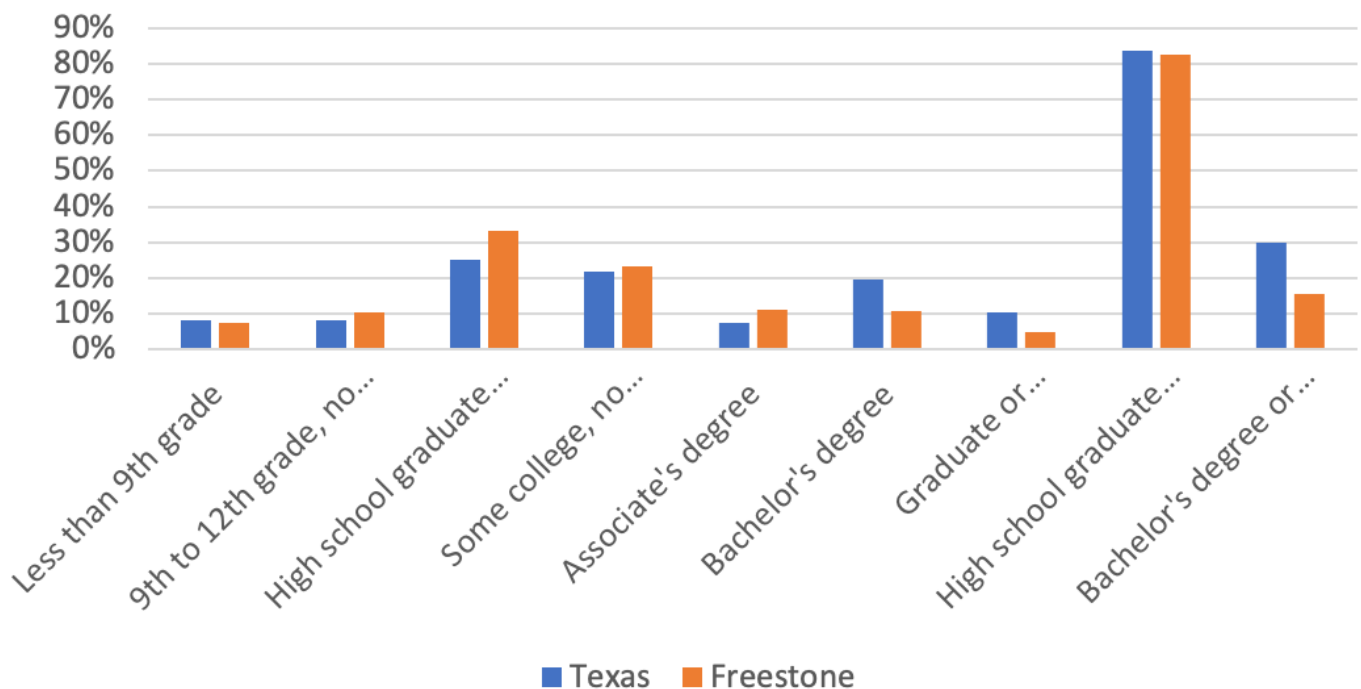
Housing²⁹²

- More than 25% of housing in Freestone County is vacant

	Texas	Bosque	Falls	Freestone
HOUSING OCCUPANCY				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
HOUSING OCCUPANCY				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Freestone county has a lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

Educational Attainment



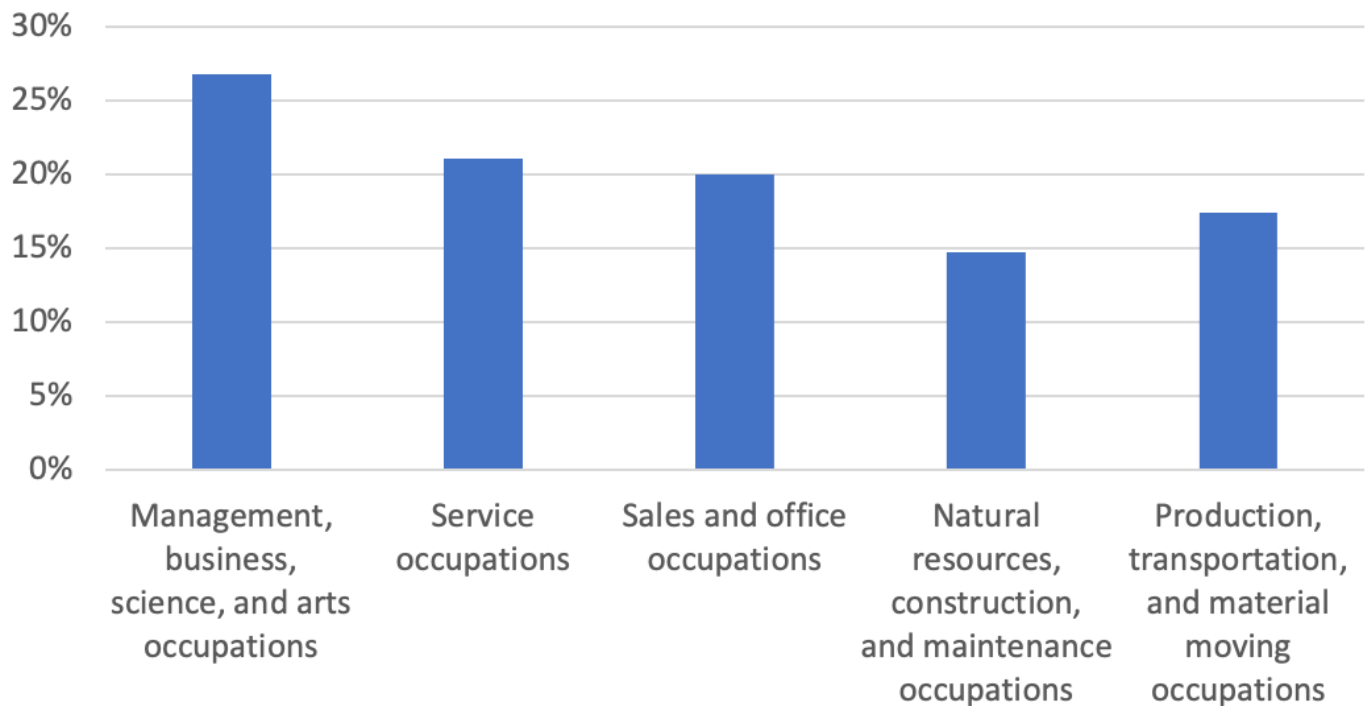
Economic Distress Criteria:²⁹³

- Freestone county has the lowest threshold calculation for Per Capita Personal Income at 67.6%.

Economic Distress Criteria–Geographic Components

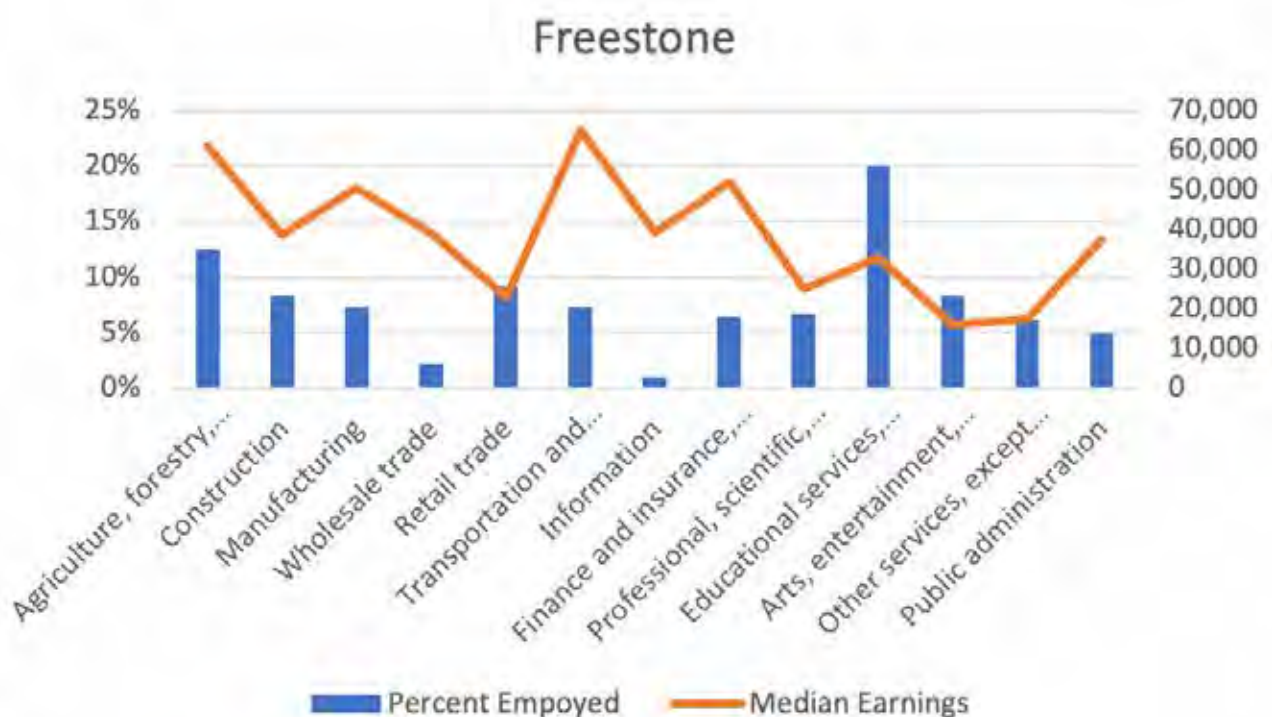
	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
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McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

Freestone County Occupations



The following chart shows percent of total employment and earning by industry.

- Educational services, and health care and social assistance and Manufacturing employ the most individuals in Freestone County, while transportation and warehousing, and Agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.



Threats:

Closure of Big Brown Plant in 2018 displacing about 200 workers, however, the Fairfield industrial park will replace some of those jobs.²⁹⁴

- Luminant Generation Co. LLC, Texas' largest power generator, shut down three coal plants in the state in 2018—including the two-unit Big Brown Power Plant in Freestone County, east of Waco. The ensuing result was a loss of 200 jobs and better air quality in the region.²⁹⁵
- Luminant was on the hook to repair the damaged land, to restore it, at a cost of some \$1 billion. But there was a problem: Luminant's parent company, Energy Future Holdings, went bankrupt.²⁹⁶
- State data shows that the closure of three coal-burning power plants in late 2017 kept more than 150,000 tons of dangerous, smog-forming air pollutants from entering the atmosphere in the following year.²⁹⁷
- Renewable energy is becoming more widespread and efficient. Today, wind power accounts for 17 percent of Texas' electric grid capacity.²⁹⁸
- "Working in a power plant is pretty specialized, and those skills will be hard to transfer to another career."
- Manitou Group leaving the area in March 2021, losing 148 jobs.²⁹⁹
 - The Manitou Group (articulated loaders production) will cease operations in Waco, Texas, at the end of March 2021 and consolidate most of the production in South Dakota, while assisting 148 employees with job searches.

Opportunities:

Built out Old Mexia-Fairfield Road to increase access to major cities and access to an industrial park with room to grow:

- **Fairfield Industrial Park North**³⁰⁰ is home to 45 acres of quality developed land.
- **Fairfield Industrial Park South**³⁰¹ is now complete and available with 125 acres of shovel ready sites for business development.
- **300 acres remaining for industrial development.**³⁰²

Fairfield Industrial Park North³⁰³ is home to 45 acres of quality developed land with the best infrastructure and location that a business could ever want. Located just off Interstate 45 in Fairfield, Texas, our “45 on 45 “ is home to industry leading companies such as Norwesco manufacturer of proprietary rotationally molded polyethylene tanks for agricultural, water, closed-top industrial and below ground septic and cistern applications), Archrock (natural gas contract compression services), Custom Hose (hydraulic hoses, hydraulic equipment & supplies, air & water hoses, pressure relief valves, oil field equipment & supply and industrial plumbing supplies), Baker Hughes (provider of integrated oilfield products, services and digital solutions), Windstream Communications (network communications and technology solutions) and Chris Christensen Systems (Professional Grooming Products and Tools for dogs).

Fairfield Industrial Park South:

Fairfield Industrial Park South³⁰⁴ is now complete and available with 125 acres of shovel ready sites for business development. The new park is located just one-half mile off Interstate 45 allowing for excellent truck transportation access to the site.

Expansion of Old Mexia-Fairfield road

- Built out Old Mexia-Fairfield road for increased commercial and industrial traffic, providing a roadway facility that can support truck traffic, and improve access to and from Interstate 45, which is a vital infrastructure route between Houston and Dallas.
- Blacklidge will set up a production site in the park, hiring 12 full-time positions.
- Mustang Oilfield Services, LLC, and oil field swabbing services and diesel repair company with 20 employees,
- Energy Transfer Company, founded in 2002 and will utilize the reconstruction portion of the road and is engaged in transportation and storage of natural gas at the Reed Compressor Station located at the end of the Old Mexia-Fairfield road with 12 employees and
- Morrison Lawn Service M & W Waste Management, LLC has been operating for over 20 years at the end of the Old Mexia-Fairfield road with 10 employees.

Diversified Manufacturing:

Freestone has diversified manufacturing companies employing more than 4,500 people in the target Industry clusters:³⁰⁵

- Fabricated Metal Product Manufacturing/Precision Metalworking
 - 23 Business Locations and 474 Industry Jobs
- Warehousing/Distribution/E-Commerce
 - 87 Business Locations and 2,874 Industry Jobs
- Plastic Product/Rubber Product Manufacturing
 - 9 Business Locations and 711 Industry Jobs
- Paper/Packaging Product Manufacturing
 - 2 Business Locations and 521 Industry Jobs

Local Incentives³⁰⁶

The Fairfield EDC (FEDC) is Fairfield's lead agency for coordinating economic assistance and incentive agreements for the business community seeking to expand or relocate operations to Fairfield. Incentives are available from both the FEDC and the City of Fairfield as noted below.

Fairfield EDC Incentives

The Fairfield EDC is funded by one half of 1% sales tax approved by the citizens of Fairfield and this is the primary source for FEDC incentives. The FEDC has a proven record of providing incentives to facilitate the location or expansion of businesses in the City.

To qualify for incentive funding through the Fairfield EDC, a thorough review of a company's business plan and financial information will be conducted.

The amount of incentive funds, if any, are granted on a case-by-case basis based on the merits of the project, including number, type and average wage of primary jobs. Additional consideration will be taken for sales tax revenue and ad valorem tax value. Following are incentives available from the FEDC:

- Land: Land cost reductions or grants
 - Equipment Grants: Cash grants for Equipment & Infrastructure
 - Infrastructure: Assistance with costs of infrastructure and utilities necessary to develop a property.
 - Workforce Assistance: Assistance with workforce training and development through our Navarro College Career & Technical Center.

City of Fairfield Incentives

The City stands ready to partner with the FEDC to provide a desirable business with incentives necessary to commit to a Fairfield location.

- **Ad-Valorem Taxes:** Utilizing a Tax Abatement or Chapter 380 Performance Agreement, the City may reduce or grant back to the business a portion of their real property taxes paid.
- **Sales Tax Grants:** Grant back to the business a portion of the sales taxes generated at the business.
- **Infrastructure Participation:** Participate in the cost of public infrastructure necessary to establish the business.
- **Construction Sales Tax:** Provide a grant for a portion of the sales tax paid to local merchants for building materials supporting new construction or business expansion.
- **TIF / TIRZ:** Establishment of strategic locations for Tax Increment Financing (TIF) within Tax Increment Reinvestment Zones (TIRZ).
- **Building and Utility Connection Fees:** Provide a partial reduction in these fees for certain developments.
- **Development Review:** Commitment to an expedited process for development of business in the City. Support a hassle-free environment with expert plan reviews and responsive comments to prospective developers and businesses.
- **Freeport Tax Exemption:** Certain businesses may apply for an exemption from personal property tax on Freeport and Goods-in-Transit inventory.
- **Workforce Assistance:** Partner with the business and other allies to provide workforce recruiting, development and training, potentially assisted by the State's Skills Development Fund.
- **Small Business Focus:** A commitment to provide an environment encouraging the development of new and expansion of existing small businesses.
- **Texas Enterprise Zone Program:** Partner with the State of Texas to promote job creation and capital investment in economically distressed areas of the City.



Hill

Demographic Summary

- Texas population projections predict a decline in population in the region over the next 30 years.

Economic Summary

- Hill County has seen a decrease in the labor force from October 2019-2020 (-91) and an increase in unemployment; the unemployment rate is on par with the Heart of Texas region and lower than the State of Texas.
- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Educational services, and health care and social assistance, Retail Trade, and Manufacturing employ the most individuals in Hill County, while information and Transportation and warehousing jobs provide the highest wages.

Sources of Economic Growth

- Sizeable city: Hillsboro with industrial & retail sectors
- Tourism & weekend home economies from lakes
- Proximity to DFW Metroplex
- Good infrastructure
- Adequate water supply

Sources of Economic Challenge

- Post-agricultural economy with relatively low-skilled workforce and low median wage

Needs

- Workforce development
- Community development
- Economic analysis
- Catalyst projects
- Improved internet access

Unemployment Over Time:³⁰⁷

- Population: 36,532
- UI Claimant Count: 190

Top 5 UI Claim Industries

1. Nursing care facilities, skilled nursing
2. Food service contractors
3. Oil and gas pipeline construction
4. Highway, street, and bridge construction
5. School and employee bus transportation



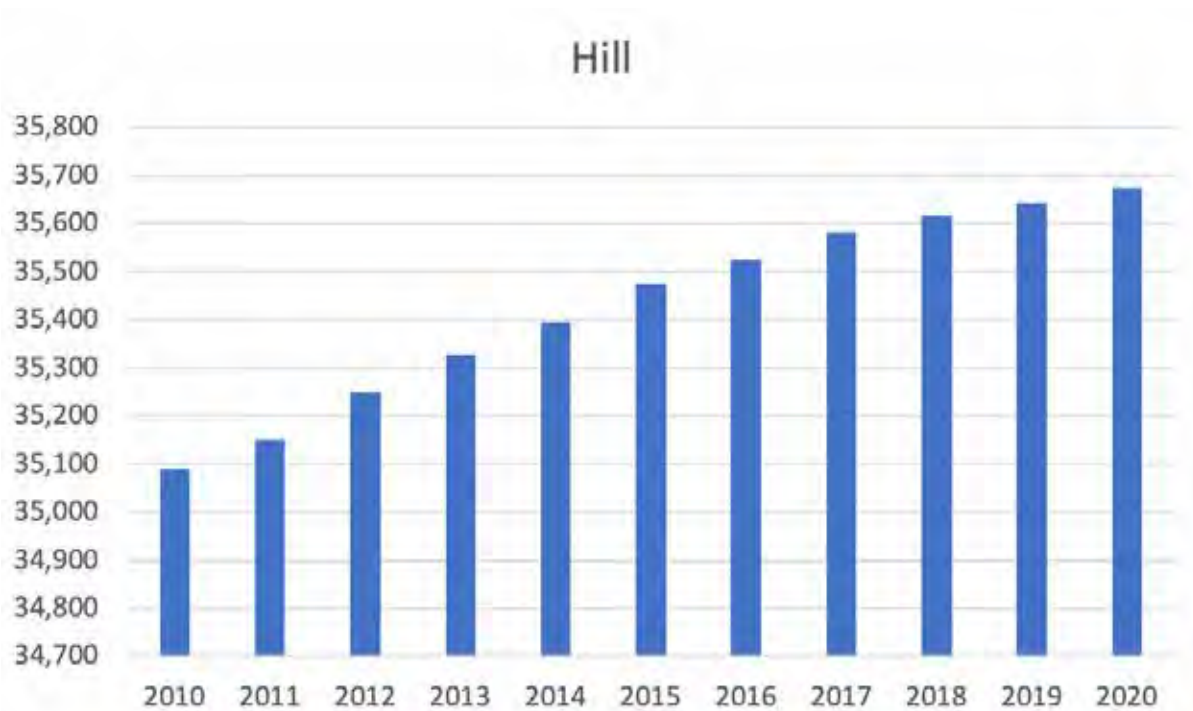
HEART OF TEXAS CEDS

	Employment October 2020 ³⁰⁸	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	Unemployed October 2020	Unemployment October 2020	Unemployed October 2019	Unemployment October 2019
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

Facts:

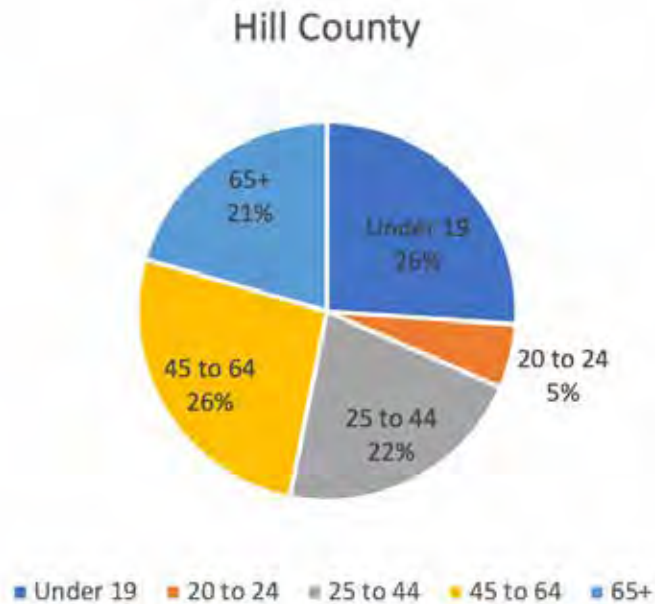
- Current Population:³⁰⁹ 35,689 (2nd most populous county in the region)
- Median Household Income: \$48,823 (+/- \$2,959)³¹⁰
- Median Age: 42.1 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 58.6%³¹¹ (61.2% in Texas, 61.7% in U.S.)³¹²
- Student to teacher ratio: 12.6 (or 12 to 1)³¹³
- Percent of children under age 18 in poverty: 18.1%³¹⁴
- Percent of students enrolled in free or reduced lunch: 63%³¹⁵

Population over time:³¹⁶



Age Distribution³¹⁷

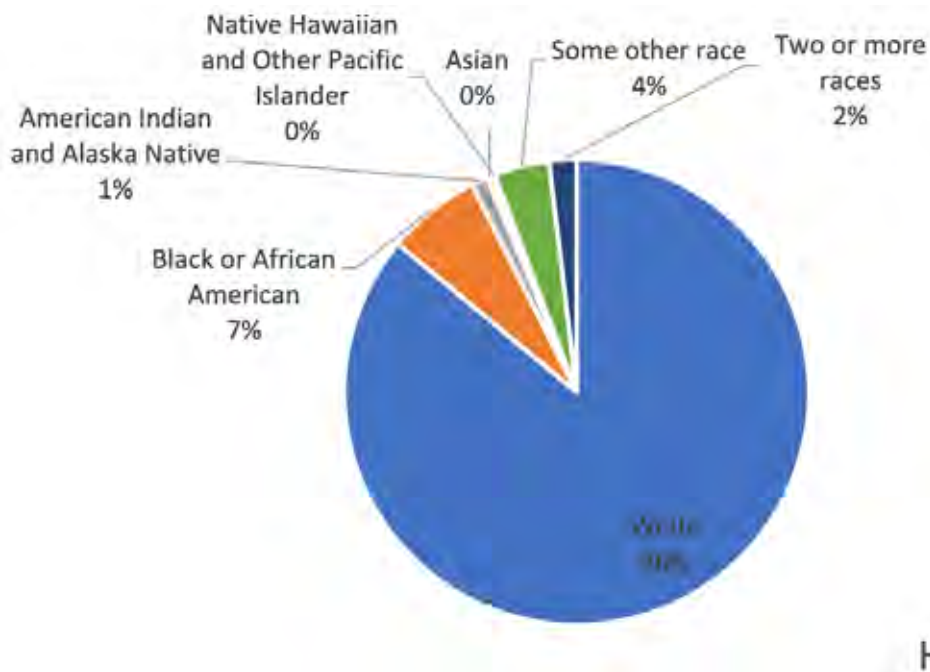
- More than 20% of the residents are of retirement age, and the median age is higher (42.1) than the state median age (34.6).
- 53% are of working age (20-64); slightly lower than the region (56%), and the state (59%).



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Race/Ethnicity Distribution³¹⁹

- Hill County is predominantly White with little diversity.



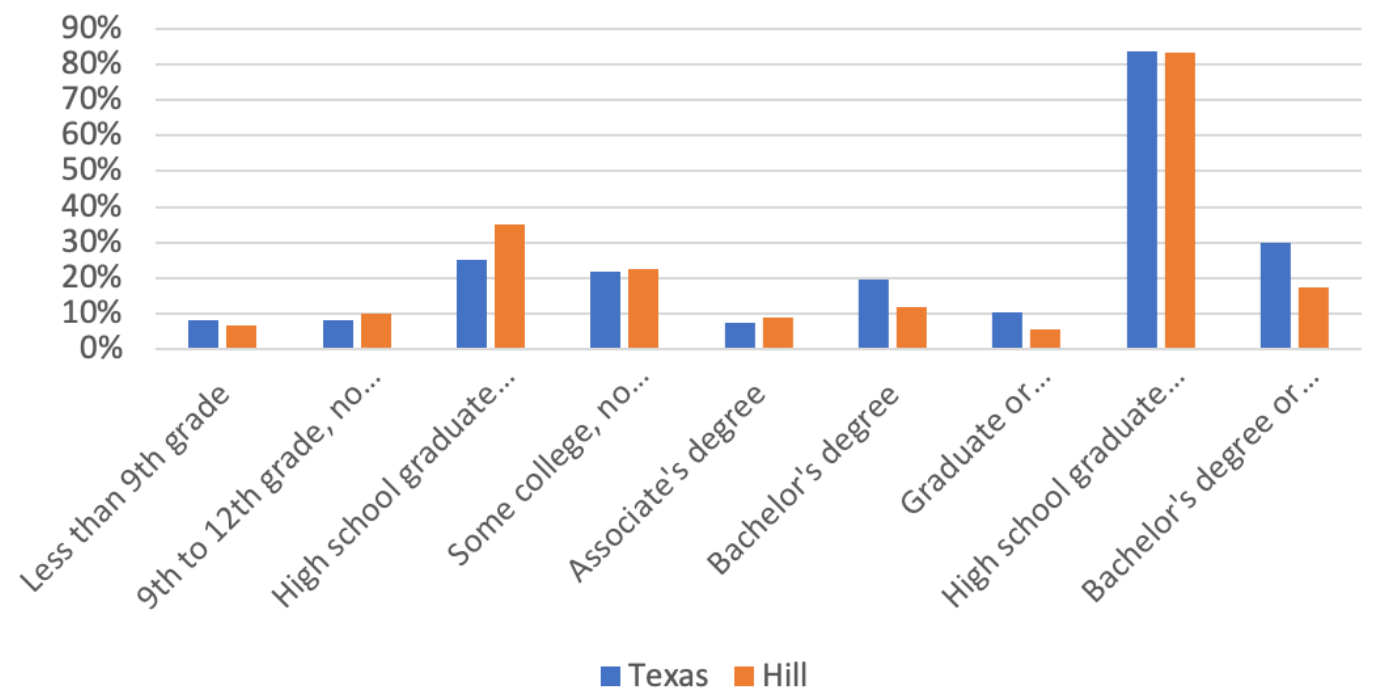
Housing³²⁰

- Just about 20% of housing in Hill County is vacant

	Texas	Bosque	Falls	Freestone
HOUSING OCCUPANCY				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
HOUSING OCCUPANCY				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Hill county has a lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

Educational Attainment

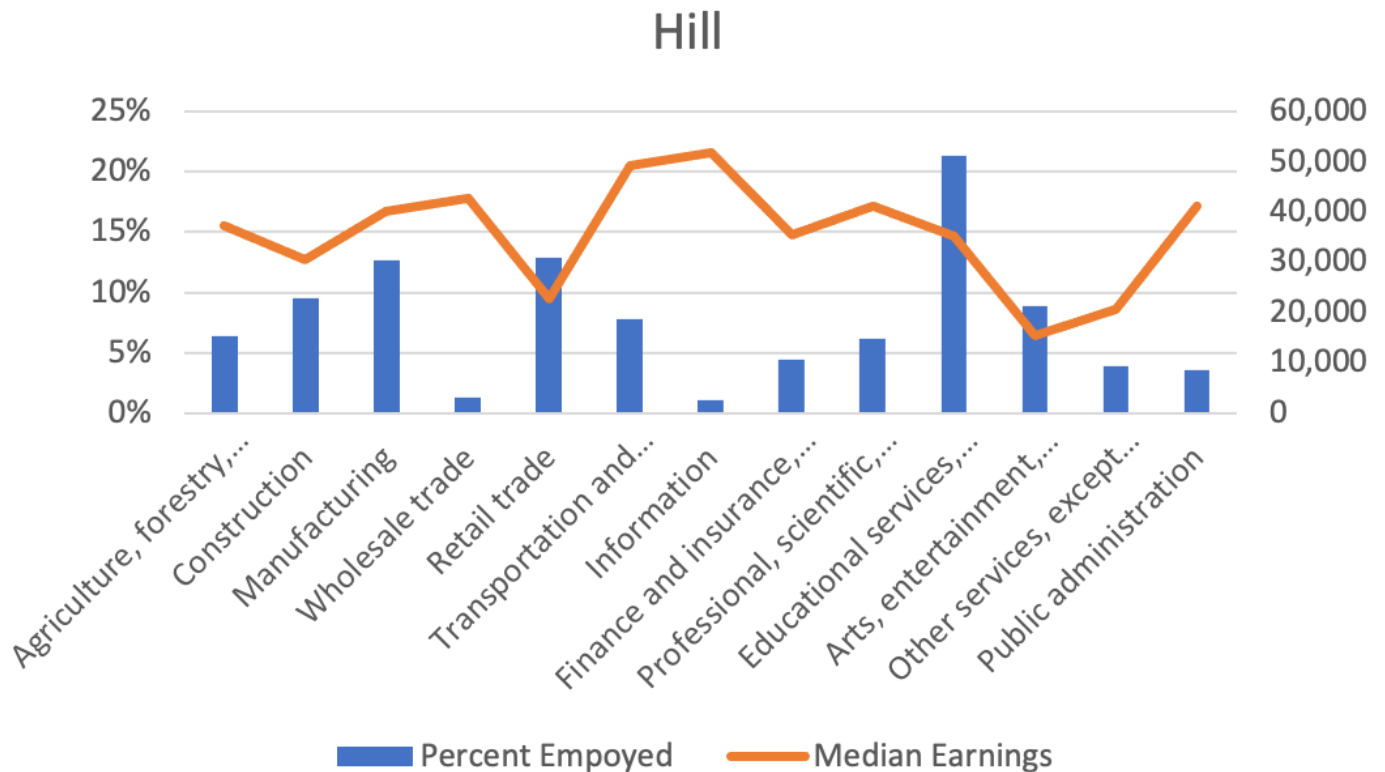


Economic Distress Criteria:³²¹

- Hill county has the third highest threshold calculation for Per Capita Personal Income at 73%.

Economic Distress Criteria–Geographic Components

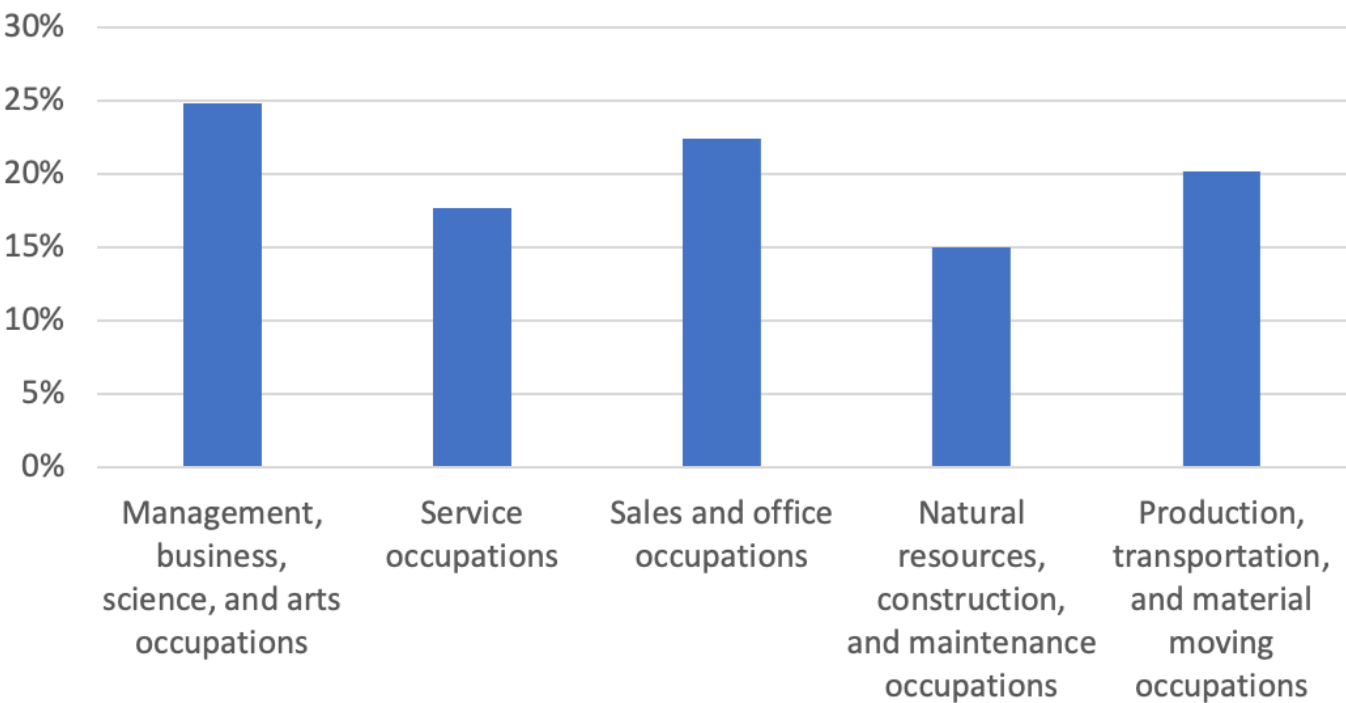
	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4



The following chart shows percent of total employment and earning by industry

- Educational services, and health care and social assistance, Retail Trade, and Manufacturing employ the most individuals in Hill County, while information and Transportation and warehousing jobs provide the highest wages.

Hill County Occupations



Limestone

Demographic Summary

- Population has declined in the past decade; Texas population projections predict a decline in population in the region over the next 30 years.

Economic Summary

- Limestone County has seen an increase in the labor force from October 2019-2020 (+36) and an increase in unemployment; the unemployment rate is higher than the Heart of Texas region and on par with the State of Texas.
- Labor Force Participation is low: 45.9%³²² (61.2% in Texas, 61.7% in U.S.)³²³
- High poverty rate
- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Educational services, and health care and social assistance employ the most individuals in Limestone County, while Agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.

Sources of economic growth

- Proximity to DFW Metroplex
- Sizeable city: Mexia with industrial & retail sector
- Tourism & weekend home economies from lakes
- Good infrastructure
- Adequate water supply

Sources of economic challenge

- Post-agricultural economy with relatively low-skilled workforce & low median wage



Needs

- Workforce development
- Community development
- Economic analysis
- Catalyst projects
- Improved internet access

Unemployment Over Time:³²⁴

- Population: 23,725
- UI Claimant Count: 90

Top 5 UI Claim Industries

1. Other heavy construction
2. Warehouse Clubs and Supercenters
3. Highway, street, and bridge construction
4. Residential site preparation contractors
5. New car dealers

	Employment October 2020 ³²⁵	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
	Unemployed October 2020	Unemployment October 2020	Unemployed October 2019	Unemployment October 2019
Texas	968,200	6.9	497,108	3.5
Falls	359	5.3	206	3.1
Heart of Texas	9,315	5.5%	5,399	3.2%

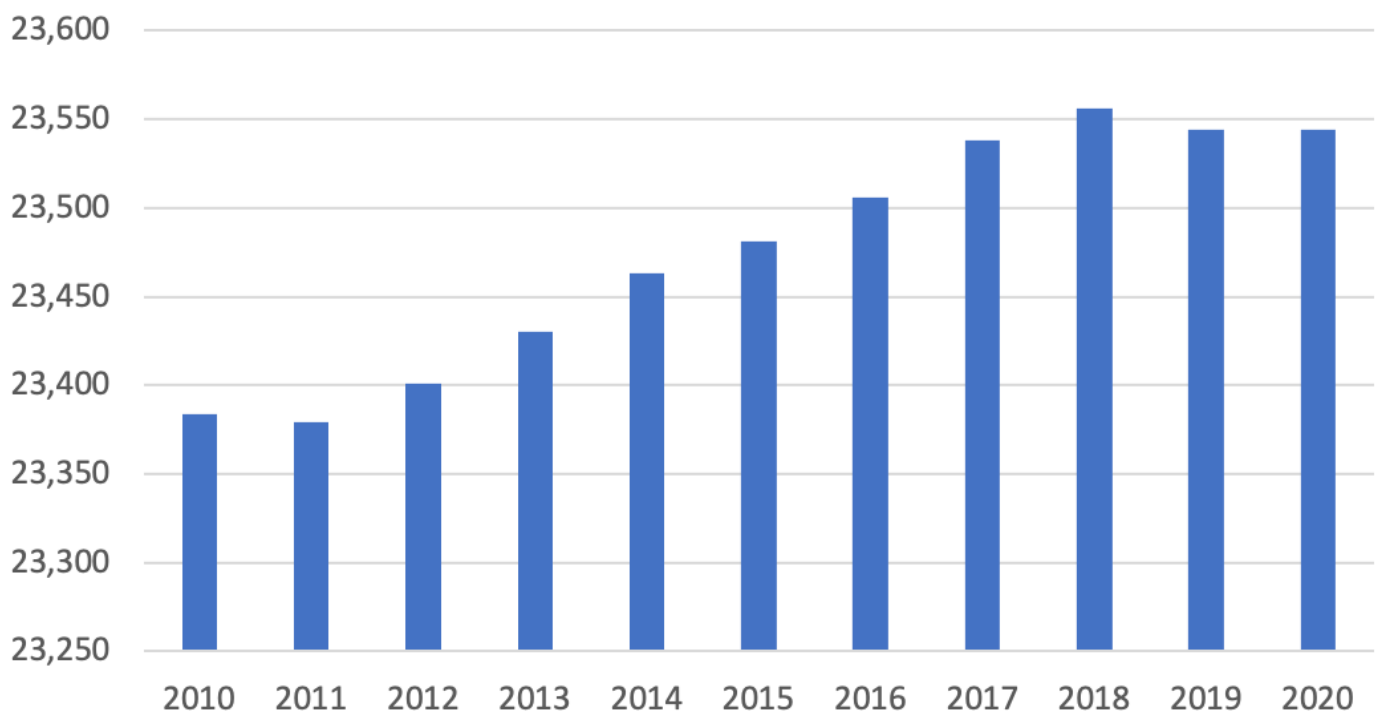


Facts:

- Current Population:³²⁶ 23,417 (3rd most populous county in the region)
- Median Household Income: \$42,680 (+/- \$4,009)³²⁷
- Median Age: 39.9 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 45.9%³²⁸ (61.2% in Texas, 61.7% in U.S.)³²⁹
- Student to teacher ratio: 13 (or 13 to 1)³³⁰
- Percent of children under age 18 in poverty: 26%³³¹
- Percent of students enrolled in free or reduced lunch: 75%³³²

Population Over Time:³³³

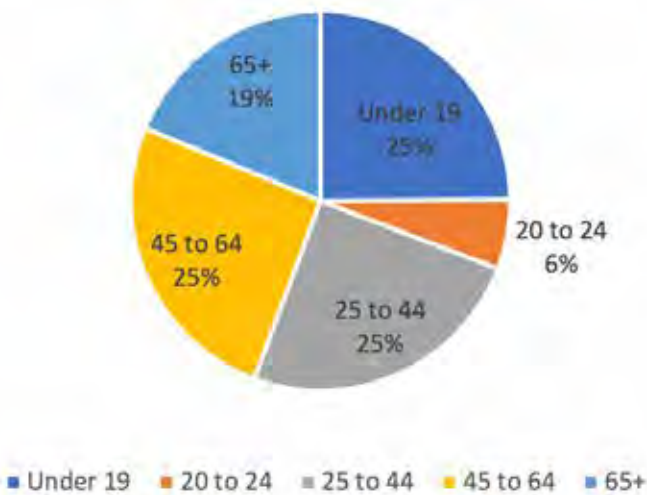
Limestone



Age Distribution³³⁴

- Just about 20% of the residents are of retirement age, and the median age is higher (39.9) than the state median age (34.6).
- 56% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%).

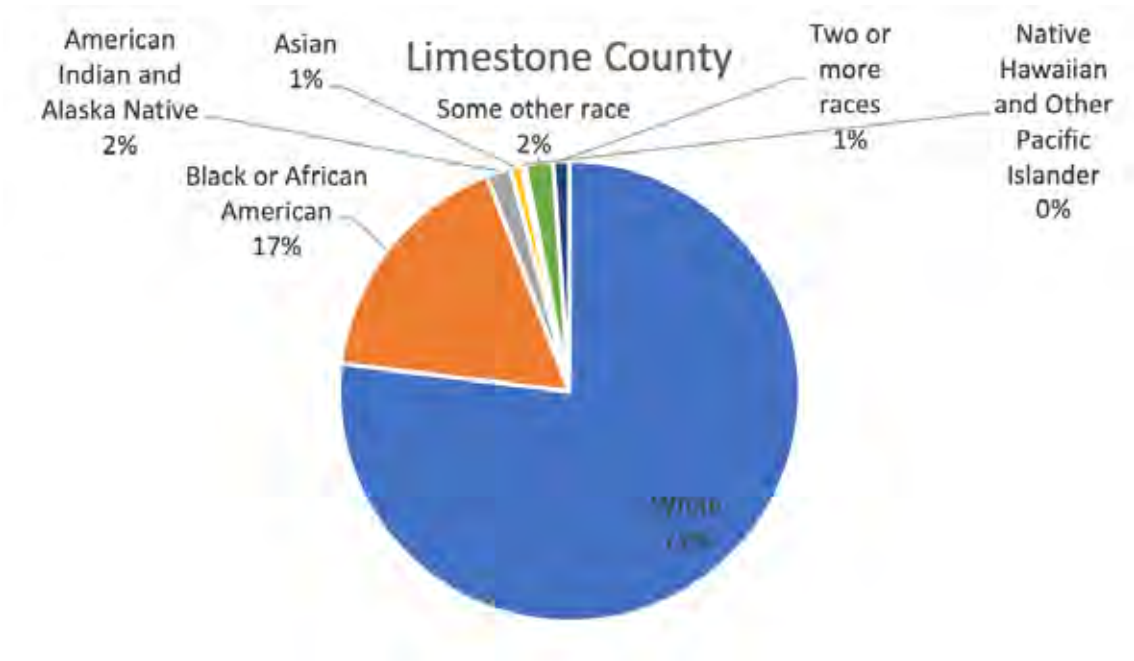
Limestone County



335

Race/ethnicity distribution

- Limestone County is predominantly White, and its demographics are on par with the region.



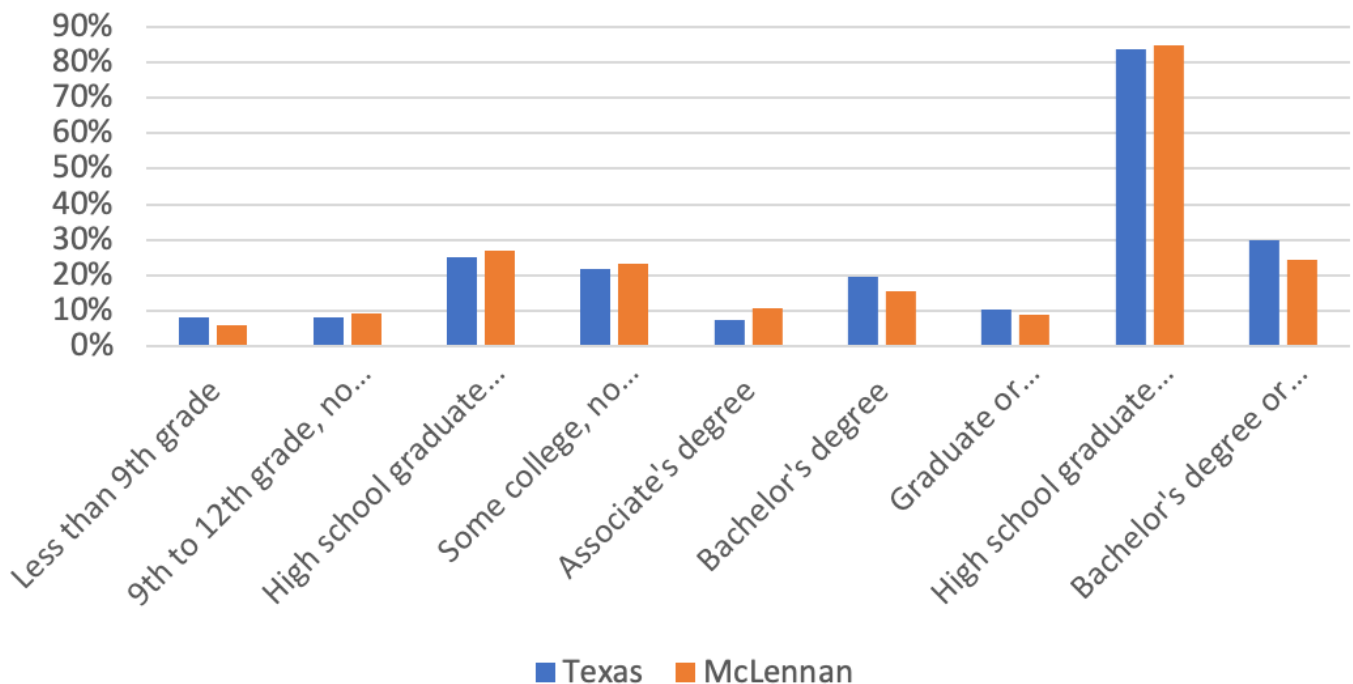
Housing³³⁶

- More than 20% of housing in Limestone County is vacant.

	Texas	Bosque	Falls	Freestone
HOUSING OCCUPANCY				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
HOUSING OCCUPANCY				
Total housing units	16,337	10,731	101,142	155,253
Occupied housing units	79.50%	78.10%	89.00%	84.1%
Vacant housing units	20.50%	21.90%	11.00%	15.9%

Limestone county has a lower education level compared to the State of Texas. Education level is linked to higher skilled jobs and thus, higher wages.

Educational Attainment



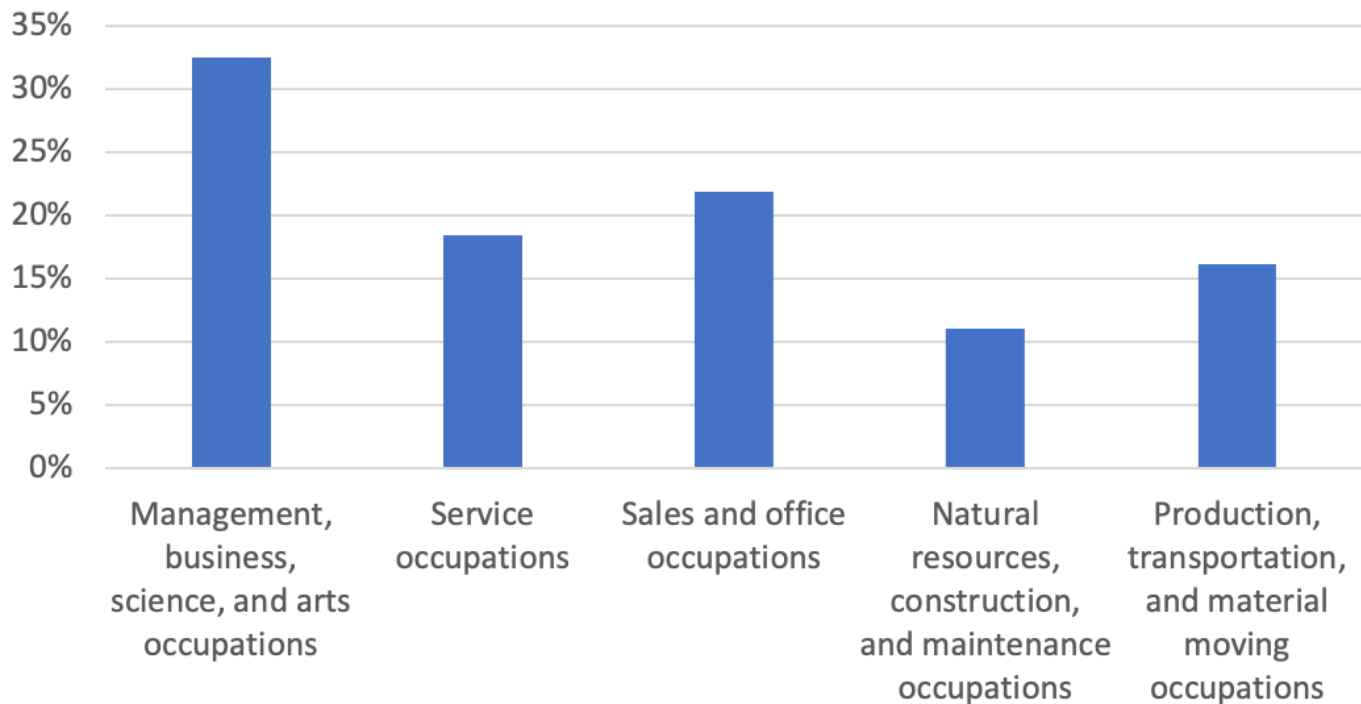
Economic Distress Criteria:³³⁷

- Limestone county has the second lowest threshold calculation for Per Capita Personal Income at 66.9%

Economic Distress Criteria–Geographic Components

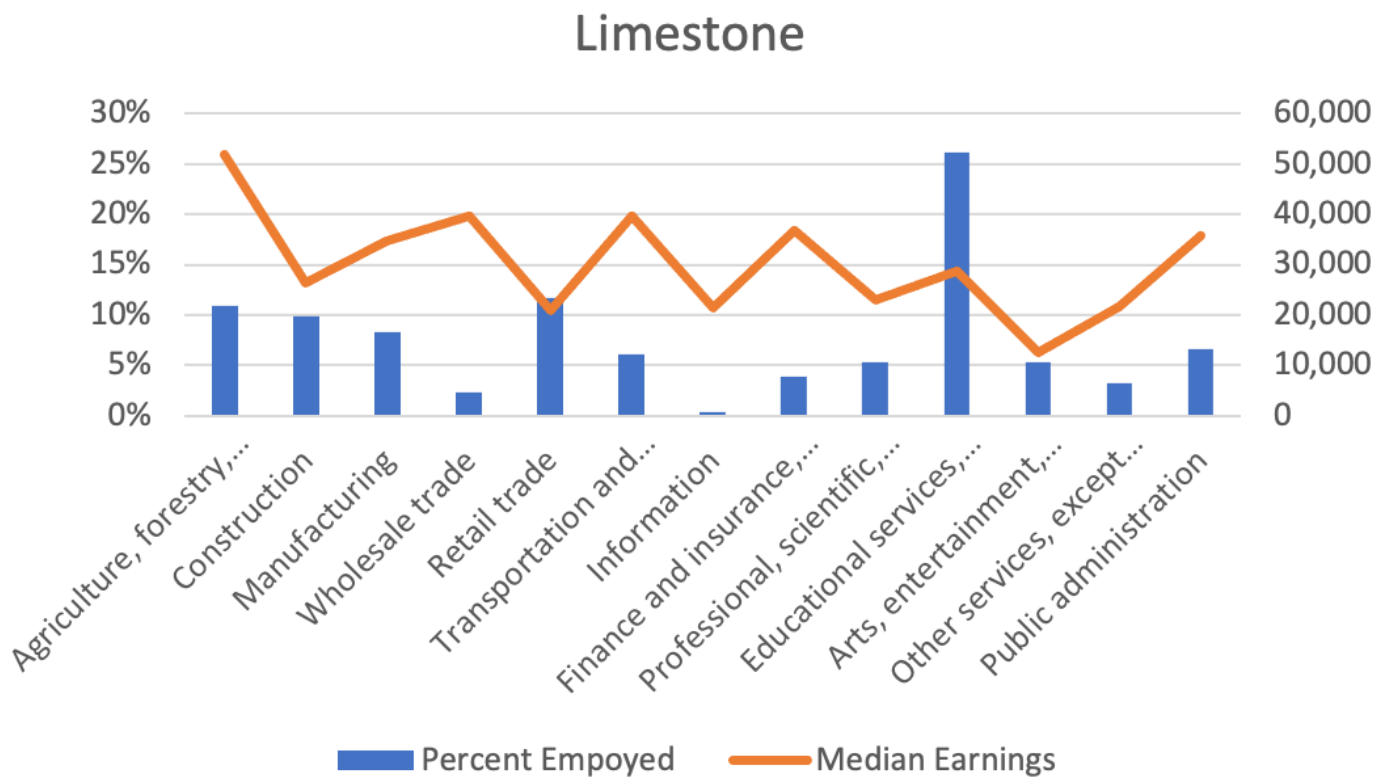
	24-Month Unemp	Threshold Calculation	2019 Per Personal Income (BEA)	Threshold Calculation	ACS 5-Year PCMI	Threshold Calculation
Bosque County, TX	4.31	-1.3	\$42,366	75	\$26,636	78.1
Falls County, TX	4.36	-1.25	\$35,258	62.4	\$18,745	55
Freestone County, TX	6.32	0.71	\$38,182	67.6	\$24,621	72.2
Hill County, TX	4.55	-1.06	\$41,240	73	\$26,370	77.3
Limestone County, TX	5.17	-0.44	\$37,774	66.9	\$22,595	66.3
McLennan County, TX	4.5	-1.11	\$42,159	74.6	\$25,703	75.4

McLennan County Occupations



The following chart shows percent of total employment and earning by industry

- Educational services, and health care and social assistance employ the most individuals in Limestone County, while Agriculture, forestry, fishing and hunting, and mining provide the highest wages, likely from Mining, quarrying, and oil and gas extraction, which will need to be replaced as this industry leaves the region.



Mart Texas in Limestone and McLennan Counties³³⁹

In 2019, Engie began building a new wind farm providing not only power to the grid, but also dollars for the school district and jobs for the area.

- The capacity to generate 300 megawatts of electricity
- Can power 200 homes during peak periods, so using that formula the farm could light up about 60,000 homes.
- The \$330 million project scattered 100 wind turbines across McLennan and Limestone counties that not only will generate electricity but also tax revenue for the local school district.
- 35,000 acres of land that are under long-term lease, primarily agricultural land with low-density residences; compatible with the operation of a wind energy project.
- Engie has at least two major clients, including Walmart, which have agreed to purchase almost half the power the turbines near Mart will generate.
- Winds there average about 7 meters per second at a height of 80 meters, according to a U.S. Department of Energy map.³⁴⁰

Prairie Hill Wind Farm project³⁴¹

- One hundred new wind turbines will be spread across McLennan County and Limestone County as part of the Prairie Hill Wind Farm project.
- This project is a \$30 million investment in McLennan County, part of a larger \$300+ million wind turbine installation investment for the region.
- Upon completion, the turbines will generate approximately 250 to 300 megawatts of energy annually.



McLennan

Demographic Summary

- This is the only county in the region projected to see population growth in the next 30 years.
- McLennan county has a lower education level compared to the State of Texas; however, it has the highest percentage of population with a bachelor's degree or higher, indicating that perhaps graduates from Baylor University may remain in the region. Education level is linked to higher skilled jobs and thus, higher wages, and therefore, McLennan county should try to convince Baylor graduates to remain in the area.

Economic Summary

- McLennan County has seen the largest increase in the labor force from October 2019-2020 (+2,555) and an increase in unemployment; the unemployment rate is lower than the Heart of Texas region and the State of Texas.
- Majority of employment falls under Management, business, science, and arts occupations and Sales and office occupations.
- Educational services, and health care and social assistance employ the most individuals in McLennan County, followed by Retail Trade and Manufacturing while Public Administration provides the highest wages.
- Introduction of retail and entertainment centers will provide jobs and revenue for the region.
- Addition of several new manufacturing, production, and distribution facilities in Texas Central Park.
- Proximity to DFW Metroplex
- Good infrastructure
- Adequate water supply

Sources of Economic Growth

- Sizeable city: Waco with sizeable industrial & retail sectors
- Tourism & weekend home economies from lakes
- McLennan County and the surrounding region attracts manufacturing facilities and will put the region on the map as a distribution and logistics hub.
 - Three new manufacturing additions will create more than 220 direct jobs.
 - Introduction of production and distribution companies to create more than 220 jobs.
 - Introduction of Amazon Fulfillment Center creating more than 1,000 jobs; will also put Heart of Texas on the map as a distribution and logistics hub
- Tesla to create talent pipeline, in partnership with Texas State Technical College in Waco, focusing on Electric Vehicles.
- Magnolia Market at the Silos will be a large entertainment and dining center that will attract visitors and tourists from all over the United States.
- 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center.³⁴²
 - Will provide employment in the construction, manufacturing, healthcare, hospitality and logistics sectors.

Sources of Economic Challenge

- Post-agricultural economy with relatively low-skilled workforce
- Low median wage

Needs

- Workforce development
- Community development
- Catalyst projects
- Improved internet access

Unemployment Over Time:³⁴³

- Population: 255,816
- UI Claimant Count: 1,575

Top 5 UI Claim Industries

1. School and employee bus transportation
2. Food service contractors
3. Limited-service restaurants
4. Temporary help services
5. Telemarketing and other contact centers

	Employment October 2020 ³⁴⁴	Employment October 2019	Labor Force October 2020	Labor Force October 2019
Texas	13,115,800	13,663,754	14,084,000	14,160,862
Falls	6,378	6,413	6,737	6,619
Heart of Texas	159,427	161,035	168,742	166,398
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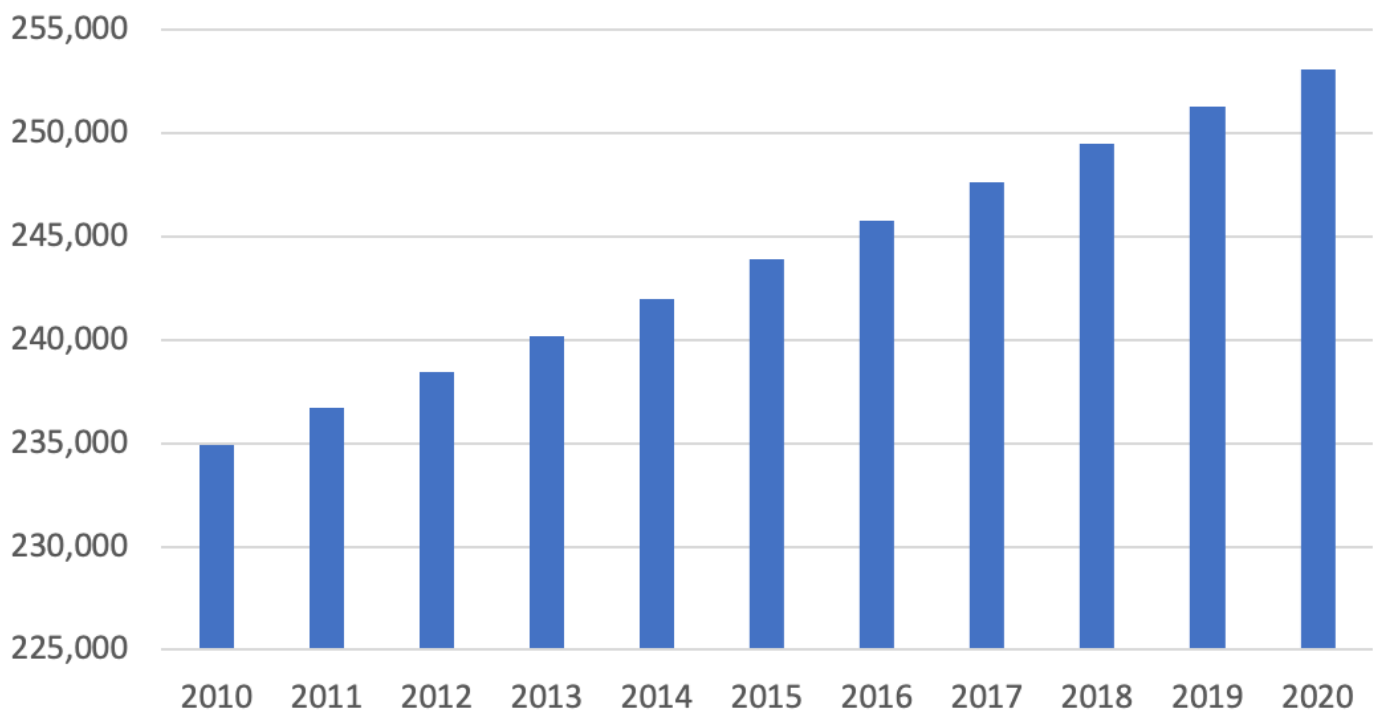


Facts:

- Current Population:³⁴⁵ 251,089 (Most populous county in the region)
- Median Household Income: \$48,199 (+/- \$1,254)³⁴⁶
- Median Age: 33.3 vs. Texas Median Age: 34.6 vs. United States Median Age: 37.9
- Percent of working-age civilians in labor force: 62.2%³⁴⁷ (61.2% in Texas, 61.7% in U.S.)³⁴⁸
- Student to teacher ratio: 14.1 (or 14 to 1)³⁴⁹
- Percent of children under age 18 in poverty: 22.6%³⁵⁰
- Percent of students enrolled in free or reduced lunch: 62%³⁵¹

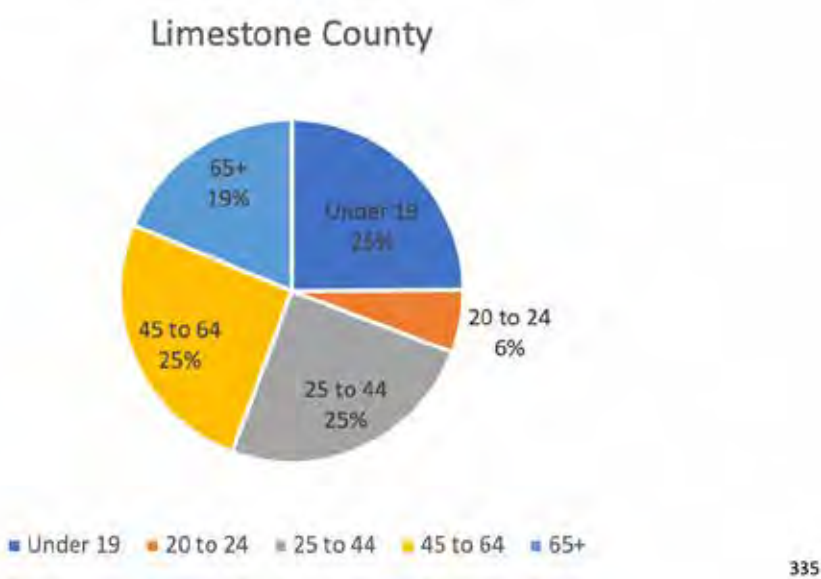
Population over time:³⁵²

McLennan



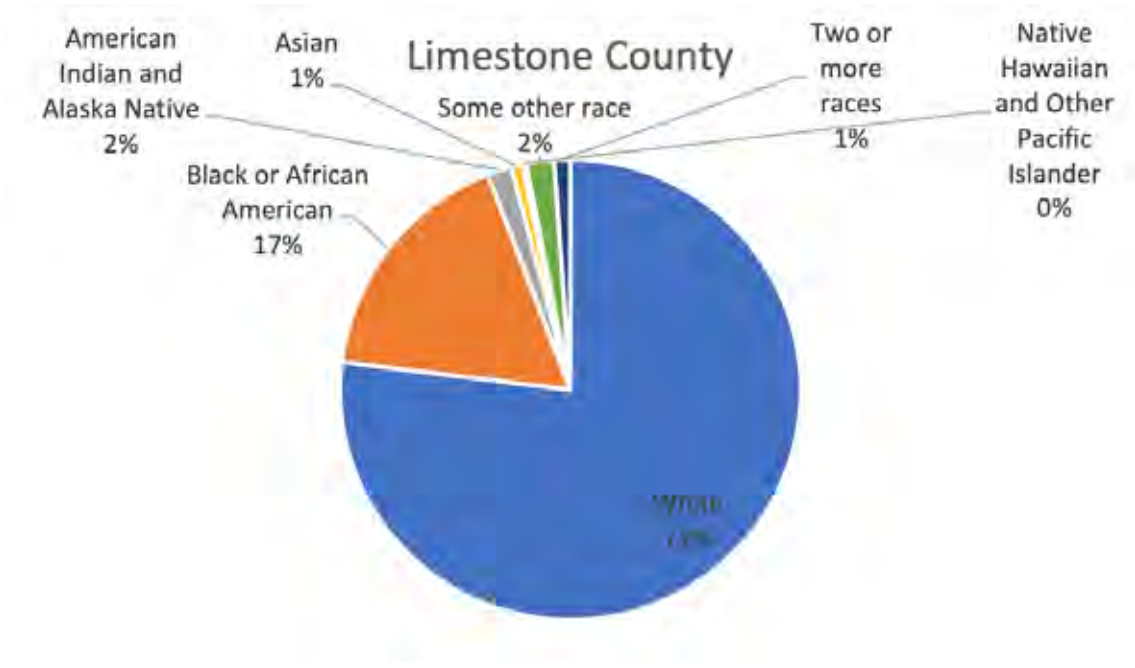
Age Distribution³⁵³

- McLennan County sees the youngest population in the region; just 14% of the residents are of retirement age, and the median age is slightly younger (33.3) than the state median age (34.6).
- 57% are of working age (20-64); on par with the region (56%), and slightly lower than the state (59%).
- McLennan County also has the highest percentage of under 19 individuals, (29%), on par with the State of Texas and a few percentage points higher than the other counties in the region. This indicates that this is a promising location to raise children, or the inhabitants are of an age or more likely to raise families in this region.



Race/ethnicity distribution

- McLennan County is predominantly White, and its demographics are on par with the region



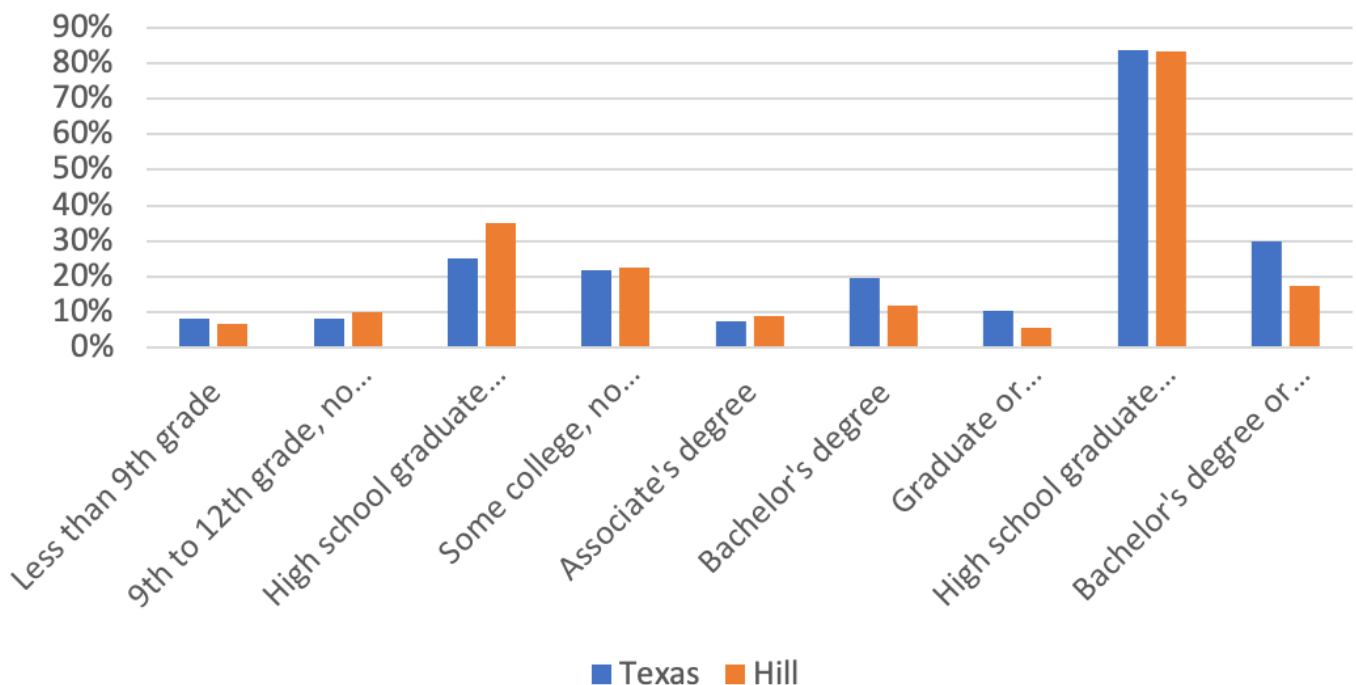
Housing³⁵⁶

- More than 10% of housing in McLennan County is vacant, almost half the rate of Hill County (20.5%)

	Texas	Bosque	Falls	Freestone
HOUSING OCCUPANCY				
Total housing units	10,937,026	9,767	7,781	9,495
Occupied housing units	88.60%	73.80%	66.80%	71.20%
Vacant housing units	11.40%	26.20%	33.20%	28.80%
	Hill	Limestone	McLennan	Heart of Texas
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Total housing units	16,337	10,731	101,142	155,253
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McLennan county has a lower education level compared to the State of Texas; however, it has the highest percentage of population with a bachelor's degree or higher, indicating that perhaps graduates from Baylor University may remain in the region. Education level is linked to higher skilled jobs and thus, higher wages, and therefore, McLennan county should try to convince Baylor graduates to remain in the area.

Educational Attainment



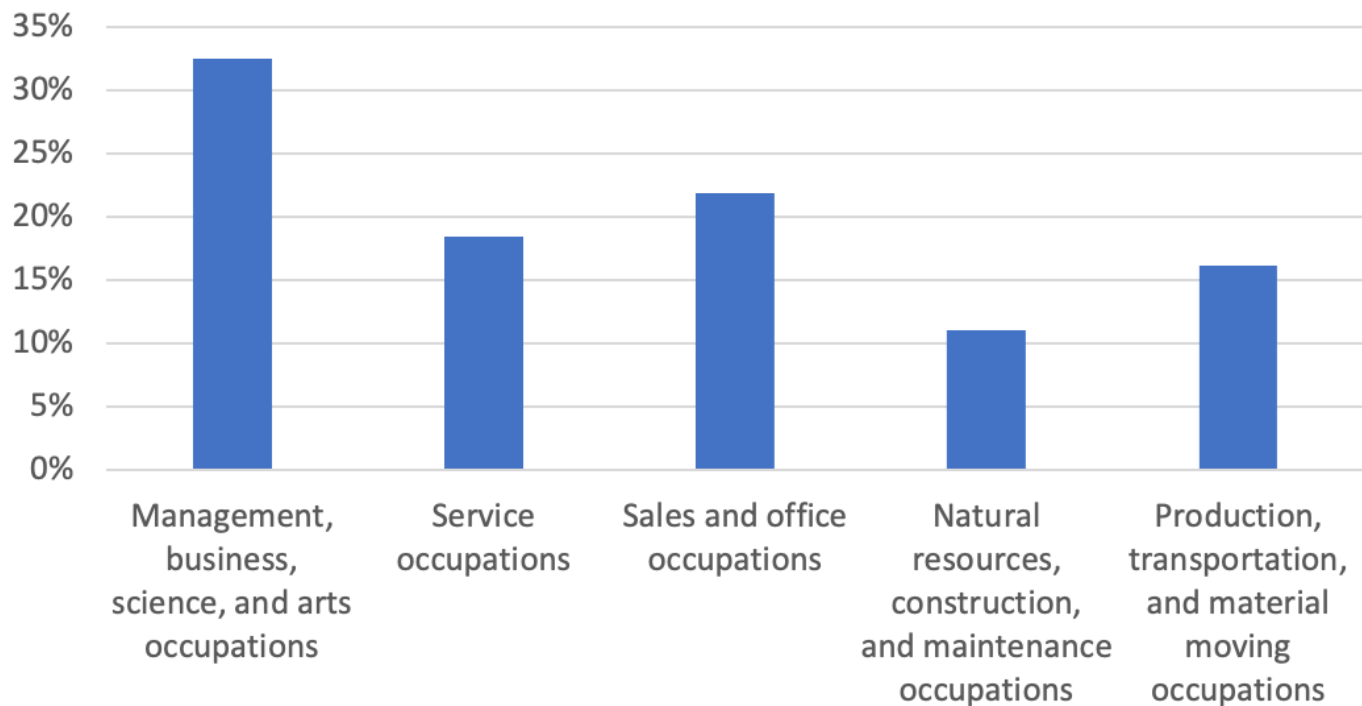
Economic Distress Criteria:³⁵⁷

- McLennan county has the second highest threshold calculation for Per Capita Personal Income at 74.6%

Economic Distress Criteria–Geographic Components

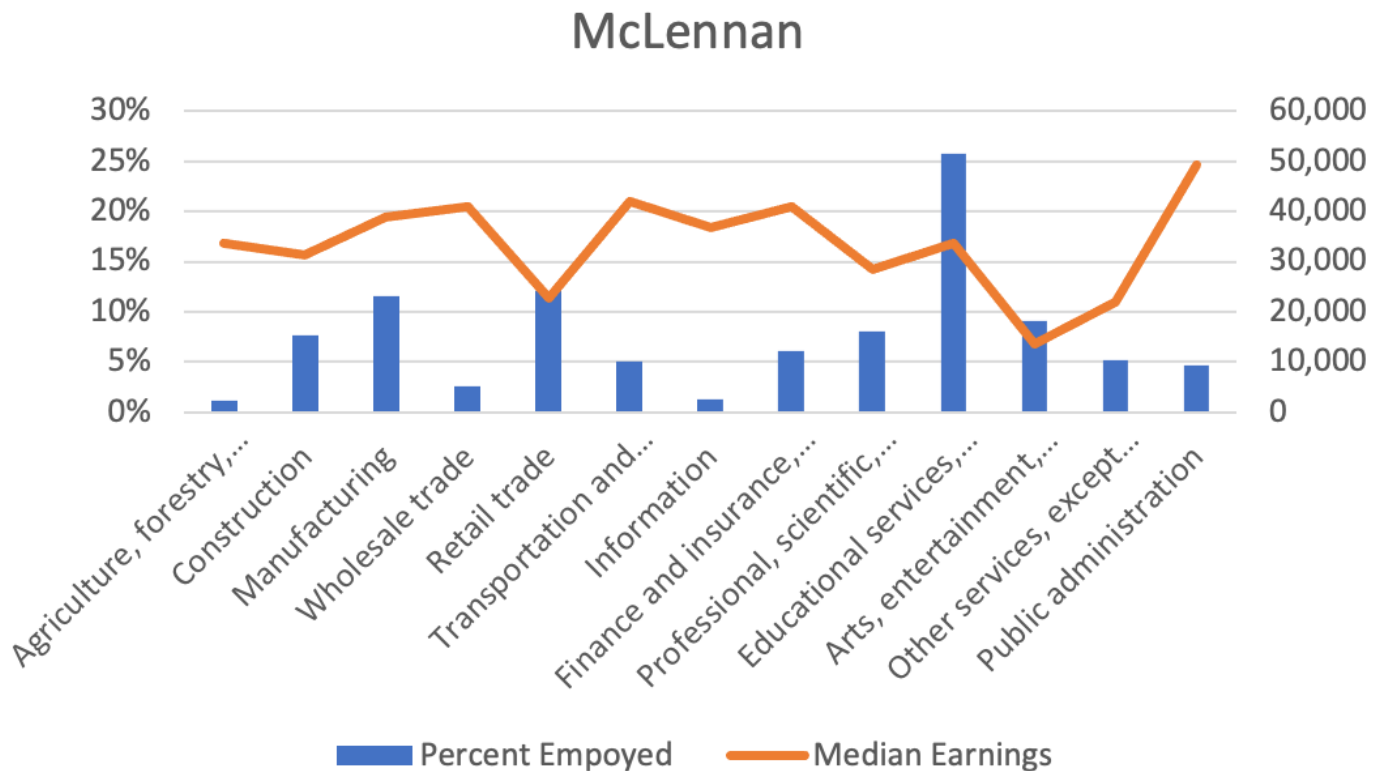
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McLennan County Occupations



The following chart shows percent of total employment and earning by industry.

- Educational services, and health care and social assistance employ the most individuals in McLennan County, followed by Retail Trade and Manufacturing while Public Administration provides the highest wages.



Industrial Parks

Texas Central Park³⁵⁸ encompasses 3,000 acres, with 1,200 of them available for development. Located in the intersection at the intersection of I-35, Texas Highway 6, and US Highway 84, the park is served by the Union Pacific main railroad line and is home to 75 companies with over 8,600 employees and over 10 million square feet, including Coca Cola North America, Masterfoods USA, Caterpillar, and Allergan, to name a few.

Robinson Business Park³⁵⁹ provides more than 600 acres of land at the crucial intersection of Interstate 35 and Highway 6/Loop 340.

The Robinson Business Park is the Waco Industrial Foundation's newest acquisition and is comprised of approximately 175 acres of commercial-zoned land, and more than 460 acres of light industrial land. The property is served with transmission-grade utilities that can serve virtually any demand requirements and is one of the few industrial parks accessing the WMARSS reclaimed/purple pipe water system (20" line).

Plans call for a new roadway that will bisect the Robinson Business Park, granting access onto Interstate 35, Loop 340 and Greig Drive, which serves as the southeastern boundary of the property. Unrecorded covenants have been drafted to ensure a premium quality business park that seamlessly brings together commercial and retail with light industrial and distribution users.



Waco International Aviation Park³⁶⁰ near Texas State Technical College (TSTC) and Interstate 35, is prime property for those in the aviation industry. TSTC is home to an all-weather runway that is 8,600 feet x 150 feet. Because the airport is not utilized by commercial airlines, the airspace is not congested. Over 300 acres of land are available for lease on TSTC airport. Adjacent to the airport is property that is particularly well suited to aircraft manufacturing and assembly. Other acreage is appropriate for aviation supplier networks not needing flight line access. Approximately 700 acres are available for development. The park is currently home to L-3 Integrated Communications, Sanderson Farms, and Dr Pepper Bottling.

Waco Regional Airport Industrial Park³⁶¹ is open to all types and sizes of business. The location lends itself naturally to businesses involved in the development or production of aviation-related products and services, and also works well for businesses that are compatible with the restrictions and regulations established by the FAA for land uses near airports. There are prime locations with ramp access connected directly to the airport runways. Businesses not requiring direct access to ramps can be located in either obligated or non-obligated areas of the airport. Non-obligated property can also be considered for sale through the newly created land sale incentive program at Waco Regional. This industrial park is also home to a Foreign Trade Zone to better meet the needs of all aviation, aviation-related, and non-aviation businesses that may locate there.

Retail and Entertainment District:

- Magnolia Market at the Silos will be a large entertainment and dining center that will attract visitors and tourists from all over the United States.³⁶³
- 143-acre Cottonwood Creek Market is being built, featuring Cinemark Theatre, Top Golf, and a bowling center.³⁶³
- Will provide employment in the construction, manufacturing, healthcare, hospitality and logistics sectors.
- Brazos Riverfront,³⁶⁴ an active mixed-use waterfront district along the Brazos River in downtown Waco, Texas and adjacent to Baylor University will combine residential, retail, restaurant, small office and hotel uses along walkable streetscapes and open space.

Magnolia Market at the Silos:³⁶⁵

- Employs more than 600 people in area, top 25 employers in Waco³⁶⁶
- In 2016, its first full year of operation, Magnolia Market reported 1,288,067 visitors.³⁶⁷
- Attractions include:
 - Shopping
 - Food Trucks
- Magnolia Market is credited for revitalizing small town Waco.

New Production and Manufacturing Facilities:

- McLennan County and the surrounding region attracts manufacturing facilities and will put the region on the map as a distribution and logistics hub.
 - 3 new manufacturing additions will create more than 220 direct jobs.
 - Introduction of production and distribution companies to create more than 220 jobs.
 - Introduction of Amazon Fulfillment Center creating more than 1,000 jobs; will also put Heart of Texas on the map as a distribution and logistics hub.
- Tesla to create talent pipeline, in partnership with Texas State Technical College in Waco, focusing on Electric Vehicles.

Texas Central Park New Additions

Envases Group, a Mexico-based global leader in the production of packaging solutions, announced plans to open its first aluminum can production and distribution center in Texas Central Park in Waco, Texas. The opening is projected for late 2021.³⁶⁸

- 120 full time jobs; 300 indirect jobs (maintenances activities, supplies, distribution of the products, etc.) and more than 250 jobs in the construction of the facility.
- \$100MM capital investment will help community.
- Prime central location
- Manufacturing workforce
- Proximity to higher education resources to nourish talent pipeline

Hello Bello³⁶⁹ to open up a diaper distribution and manufacturing center in Texas Central Park in Q2 2021.

- 312,000 square-foot state-of-the-art manufacturing center
- Expects to create over 110 new jobs in the region
- \$31M in capital investment
- Decision is based on the location's **central geography** for its direct-to-consumer customers, retail and premium supply partners, providing **logistical efficiencies** and significant **reduction in freight**.
- Hello Bello's decision to choose Waco for its manufacturing and distribution operations is a testament to our **central location**, energetic, **skilled workforce**, **lower taxes** and **reasonable regulations**.

Merrick Engineering³⁷⁰

- Leading manufacturer of plastic and injection molded consumer products
- 400,000 square-foot manufacturing and distribution facility along with the corporate offices.
- Construction commencing in 2020, relocating in 2021
- Will create 20 new positions. Of the new positions to be created, 10 will be headquarter professionals.

Other Additions to the Region

Amazon³⁷¹

Introduction of Amazon Fulfillment Center creates jobs and is a good step toward economic recovery; it will also put Heart of Texas on the map as a distribution and logistics hub

- 700,000-square-foot Amazon robotic fulfillment center in Waco.
- Will create 1,000 new jobs that will pay a minimum of \$15 an hour and will include comprehensive budgets and as much as 20 weeks of maternal and parental paid leave.
- Under construction on a more than 90-acre site at 2000 Exchange Parkway west of Baylor Scott & White Hillcrest Medical Center, is scheduled to open 2021.
- The Greater Waco Chamber of Commerce, the Waco-McLennan County Economic Development Corp. and the Waco Industrial Foundation worked together to attract Amazon.

Holt Cat:³⁷²

- Holt Cat, the largest distributor of Caterpillar equipment in the United States, said plans to open its new manufacturing facility remain on track in Waco, Texas.
- San Antonio-based Holt Cat acquired the former Caterpillar Work Tools plant in Waco from Illinois-based Caterpillar Inc. in February. Holt Cat said it plans to build proprietary items such as Holt Spray King water trucks and tank products and custom-engineered products at the factory.
- “Our May opening is still on schedule. We are confident we will find the quality of candidates we need in the Waco area to get the facility up and running successfully,” Beki Hutchinson, Holt Cat’s senior vice president of human resources, said according to the Waco Herald-Tribune.
- Holt Cat said it is hiring 100 employees for the factory, including technicians, welders, fabricators and managers. Hutchinson said the company may use “remote interviewing tools” to interview job applicants.
- The factory includes 107 acres with three buildings and a total of 170,000 square feet of manufacturing, warehouse and office space, the company said in a press release.

Texas Meter & Device³⁷³

- Will begin construction of its new corporate headquarters in Waco.
- This project will involve a \$3.5 million capital investment with the construction of a 50,000-70,000 square foot headquarters and assembly center.
- Will retain 60 jobs at its new facility.

ZinkPower³⁷⁴

- One of the business units of the Australian group Kopf
- Leader in hot-dip galvanizing and powder-coating services, will locate its first U.S. greenfield operation in Waco, Texas.
- \$32 million investment, which includes the construction of a 160,000 square-foot facility and equipment
- Over four years, Zinkpower anticipates the creation of 100 new jobs.
- The Waco plant will be the only hot-dip galvanizing center between the Dallas/Fort Worth Metroplex and San Antonio.

Aspen Custom Trailers³⁷⁵

- A high-end custom commercial trailer manufacturer, based in Alberta, Canada.
- Chose Waco for first U.S. manufacturing operation.
- Will invest \$11.27 million into its new 58,000 square foot facility in the Gateway Business Park, with plans to expand to 70,000 square feet.
- The company will add 70 new highly skilled jobs in the market.

Ryonet Corporation³⁷⁶

- A leading screen printing supply distributor will consolidate its US distribution centers in Kansas and Georgia to a single location in Waco, TX.
- The company's 35,000 square foot facility will employ 10 employees initially with plans for additional growth.

Laminate Technologies³⁷⁷

- A custom laminate panel and fabrication manufacturer will relocate its production facility within Texas to Waco.
- The company will invest \$4 million into a 50,000 square foot facility and plans to create 40 jobs by 2021.

Advanced Rail Systems³⁷⁸

- Leaders in railway automation, is moving its manufacturing operation to Riesel, TX in McLennan County from Falls County.
- This \$2.2 million project will bring 69 new high-skilled jobs to the community.
- The company is currently building its 23,250 square foot manufacturing facility, where it will produce power switch machines for rail operations.

SpaceX³⁷⁹

- Enhancing its presence in the Greater Waco area, announcing a \$10 million expansion of water and electric infrastructure improvements to its existing facility in McGregor.

Prairie Hill Wind Farm project³⁸⁰

- One hundred new wind turbines will be spread across McLennan County and Limestone County as part of the Prairie Hill Wind Farm project.
- This project is a \$30 million investment in McLennan County, part of a larger \$300+ million wind turbine installation investment for the region.
- Upon completion, the turbines will generate approximately 250 to 300 megawatts of energy annually.

Glory Leasing, LLC³⁸¹

- Announced a new solar farm to the Central Texas area.
- Divided evenly between McLennan and Bosque Counties, this \$130MM+ solar project is expected to generate over 161 MW.
- Construction is projected to begin Q2 2020 with completion scheduled late 2022.
- Over 430 MW of renewable energy production be added to the state electric grid, annually.

New Era Partners³⁸²

- Begun construction on a \$10 million facility for the Oceans Behavioral Health Hospital network located in the Greenway Business Park, adjacent to Baylor Scott & White Medical Center – Hillcrest.
- Oceans Healthcare is a behavioral health provider focused on healing and long-term recovery.
- The company plans to open a 48-bed, 35,000 square foot facility later this year.
- Once completed, the hospital expects to employ 90 clinical and non-clinical positions.

The Coca-Cola Company³⁸³

- National manufacturing company has announced a \$30 million investment and a 20,000 square foot expansion of their Waco facility.
- The project will create 20 new skilled positions in addition to retention of their more than 350 current employees.
- Coca Cola is adding a new “flex brew” line the Waco facility, which will permit research and development of new products and is the first of its kind in the United States.

Tesla³⁸⁴

- Tesla offers a 12-week electric vehicle service training program, culminating in a 2-year employment contract at a Tesla Service Center.
- Disadvantage: Completing this program will likely require relocation out of the Heart of Texas area.

The START Program Technician will go through an intensive EV service training program designed to provide the candidates with the skills necessary for a **successful career with Tesla**. During the program, students will develop technical expertise and earn certifications through a blended approach of in-class theory, hands-on labs and self-paced learning. Students are also given enhanced soft skills and team-based repair practices. Relevant military service may be substituted for industry experience, and military veterans are encouraged to apply.

Mart Texas in Limestone and McLennan Counties

In 2019, Engie began building a new wind farm³⁸⁵ providing not only power to the grid, but also dollars for the school district and jobs for the area.

- The capacity to generate 300 megawatts of electricity
- Can power 200 homes during peak periods, so using that formula the farm could light up about 60,000 homes.
- The \$330 million project scattered 100 wind turbines across McLennan and Limestone counties that not only will generate electricity but also tax revenue for the local school district.
- 35,000 acres of land that are under long-term lease, primarily agricultural land with low-density residences; compatible with the operation of a wind energy project.
- Engie has at least two major clients, including Walmart, which have agreed to purchase almost half the power the turbines near Mart will generate.
- Winds there average about 7 meters per second at a height of 80 meters, according to a U.S. Department of Energy map.³⁹⁶

Solar Farm in Robinson with Cypress Creek Renewables³⁸⁷

- Robinson is close to a substation.
- Initial 55-percent tax abatement, which allows the property tax to be reduced for about a 5-year period.
- Perk is tax revenue- won't bring a large number of jobs to the area.
- The solar farm will be close to an industrial park, which might encourage other companies to put down roots in Robinson.
- A separate company looking to build a third solar farm in County Precinct 4 that will be in both McLennan and Bosque Counties.

Eddy II, owned by NRG Energy³⁸⁸

- Solar Farm in Bruceville-Eddy
- NRG Energy got tax breaks for the \$13 million project.
- Nearly 90 acres, Eddy II packs a 10-megawatt wallop, enough to provide energy to 1,300 homes annually.

Major Employers³⁸⁹

Rank	Company	Industry	Total Employment
1	Baylor University	Education	3,253
2	Waco ISD	Education	2,373
3	H-E-B	Retail	2,000
4	Baylor Scott & White Medical Center - Hillcrest	Healthcare	1,736
5	Texas State Technical College Waco	Education	1,706
6	Ascension Providence	Healthcare	1,622
7	City of Waco	Local Government	1,518
8	McLennan County	Local Government	1,201
9	Sanderson Farms Inc.	Manufacturing	1,200
10	Wal-Mart	Retail	1,174
11	Midway ISD	Education	1,081
12	Veterans Administration Medical Center	Healthcare	886
13	Examination Management Services, Inc. (EMSI)	Professional Services	824
14	Veterans Affairs Regional Office	Federal Government	796
15	AbbVie	Manufacturing	785
16	L3Harris	Aerospace	774
17	McLennan Community College	Education	719
18	Mars Wrigley Confectionery	Manufacturing	700
19	Aramark	Professional Services	696

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20	American Income Life	Insurance	693
21	Magnolia	Retail	675
22	Texas Materials	Manufacturing	672
23	Cargill Value Added Meats	Manufacturing	646
24	SpaceX	Aerospace	590
25	Texas Department of Human Services	Management	549
26	Versalift	Manufacturing	518
27	Family Health Center	Healthcare	510
28	Texas Youth Commission - McLennan County SJCF	State Government	499
29	Howmet Fastening Systems	Manufacturing	490
30	Pilgrims	Manufacturing	480
31	Texas Farm Bureau and Affiliated Companies	Insurance	471
32	La Vega ISD	Education	445
33	Coca-Cola North America	Manufacturing	440
34	Tractor Supply Company Distribution	Retail	420
35	Connally ISD	Education	394
36	China Spring ISD	Education	388
37	O-I Glass	Manufacturing	385
38	Heart of Texas Region MHMR Center	Healthcare	384
39	Heart of Texas Goodwill Industries, Inc.	Non-Profit	383
40	Wal-Mart Return Center	Logistics	372
41	Brazos Masonry	Construction	354
42	Army and Air Force Exchange Service	Logistics	353
43	Texas Department of Transportation	State Government	336
44	Robinson ISD	Education	325
45	Sherwin Williams	Logistics	313
46	Packaging Corporation of America	Manufacturing	313
47	Lorena ISD	Education	302
48	Johnson Roofing	Construction	300
49	Neighborly	Management	295
50	Caterpillar Logistics - Parts Distribution Center	Logistics	272
51	Lochridge Priest	Manufacturing	264
52	McGregor ISD	Education	253
53	Big Creek Construction	Construction	250



54	Clayton Homes	Manufacturing	260
55	Eagle Systems, Inc.	Professional Services	238
56	Education Service Center Region 12	Education	234
57	Fleetwood Homes	Manufacturing	230
58	United States Postal Service	Government	168
59	Economic Opportunities Advancement Corp	Non-Profit	229
60	George's Restaurant	Services	225
61	Waco Center for Youth	Healthcare	223
62	Methodist Children's Home	Healthcare	222
63	Nurses Unlimited, Inc.	Healthcare	216
64	Brazos Electric	Utility	215
65	Atmos Energy	Utility	210
66	American Amicable Life Insurance Co	Insurance	199
67	Central Freight Lines, Inc.	Logistics	188
68	Trane	Construction	184
69	Adecco Employment Services	Professional Services	180
70	TYMCO	Manufacturing	177
71	Total Placement Staffing Solutions	Education	171
72	Scott & White Healthcare	Healthcare	171
73	Packless Industries	Manufacturing	169
74	Manitou North America	Manufacturing	167
75	Central Texas Iron Works	Manufacturing	164
76	Holt CAT	Construction	162
77	Quality Brickworks, Ltd.	Construction	160
78	Support Services Group - S2G	Professional Services	157
79	UPS Delivery	Logistics	155
80	Dirt Cheap	Retail	154
81	Jessup Manufactured Housing	Manufacturing	153
82	Rapoport Academy Public School	Education	152
83	Blue Cross Blue shield	Health Care	150
84	Knife River Corporation	Construction	150
85	AT&T	Utility	150
86	Coca-Cola Southwest Beverage	Logistics	149
87	Integ	Media	148

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88	Merrick Engineering	Manufacturing	148
89	Hobbs Bonded Fibers	Manufacturing	146
90	Spherion	Professional Services	146
91	Capstone Mechanical	Construction	144
92	Texas Life Insurance Company	Insurance	144
93	Extraco Banks	Financial	142
94	JRBT Certified Public Accountants	Professional Services	138
95	Central Texas Corrugated	Manufacturing	137
96	Spectrum	Utility	137
97	Visiting Angels	Healthcare	135
98	Ridgecrest Retirement Center	Healthcare	133
99	Kasparian Underground, LLC	Construction	132
100	Clarke Products	Manufacturing	131
101	H&B Packing Co. Inc.	Manufacturing	130
102	Naman Howell Smith & Lee, PLLC	Professional Services	125
103	M. Lipsitz & Co., Ltd.	Manufacturing	125
104	YMCA of Central Texas	Non-Profit	124
105	Wesley Woods Alzheimer's Care Center	Healthcare	122
106	Metals 2 Go	Manufacturing	121
107	Ferguson Enterprises Inc. 474	Distribution	121
108	Lowe's Home Center	Retail	120
109	Moody ISD	Education	117
110	Oncor	Utility	115
111	Dillard's Department Store	Retail	113
112	Allen Samuels Dodge-Chrysler-Jeep	Retail	111
113	Sturdisteel Company	Manufacturing	110
114	Quality Care Nursing & Rehabilitation Center	Healthcare	110
115	Sam's Wholesale Club	Retail	108
116	Bosqueville ISD	Education	108
117	Ridgewood Country Club	Recreation	106
118	Community Bank & Trust	Financial	105
119	Swan Products	Manufacturing	104
120	Britco Structures USA, LLC	Manufacturing	100
121	Brazos River Authority	State Government	99



122	The First National Bank of Central Texas	Financial	98
123	American Bank	Financial	98
124	VanTran Industries	Manufacturing	98
125	Crestview Healthcare Residence	Healthcare	96
126	Behlen Manufacturing	Manufacturing	94
127	Hilton Waco	Hospitality	93
128	Pattillo, Brown & Hill, L.L.P.	Professional Services	93
129	Jobes Company / Easy Gardener Products Inc.	Manufacturing	91
130	Do it Best Corp.	Logistics	91
131	City of Woodway	Local Government	90
132	Keurig Dr Pepper	Logistics	90
133	Valley Mills ISD	Education	90
134	City of Hewitt	Local Government	89
135	Crawford ISD	Education	88
136	Regent Care	Healthcare	88
137	Alamo Structural Steel	Construction	87
138	Marathon Norco Aerospace, Inc.	Aerospace	86
139	Riesel ISD	Education	85
140	Sonoco Flexible Packaging	Manufacturing	84
141	Ram Aircraft, LP	Aerospace	84
142	Jeff Hunter Motors	Retail	83
143	Glazer's Wholesale Distributors	Logistics	82
144	Dealers Electrical Supply Co.	Utility	82
145	Waco Housing Authority & Affiliates	Local Government	81
146	Specialty Composites Group	Manufacturing	80
147	Forterra Pipe and Precast	Manufacturing	80
148	Imperial Woodworks, Inc.	Manufacturing	80
149	Target	Retail	80
150	Central National Bank	Financial	78
151	Bird-Kultgen, Inc.	Retail	78
152	Simple Bills	Professional Services	77
153	City of Bellmead	Local Government	76
154	KXXV News Channel 25	Media	76
155	Grande Communications	Utility	76

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156	Home Depot	Retail	75
157	Richard Karr Motors	Retail	74
158	Waco Tribune-Herald	Media	74
159	City of Robinson	Local Government	72
160	Balfour / Powers Varsity Jackets	Manufacturing	69
161	Lehigh White Cement	Manufacturing	65
162	KCEN-TV	Media	65
163	Let's Gel	Manufacturing	63
164	PCA Texas Acquisition, LLC	Manufacturing	63
165	Wells Fargo	Financial	63
166	Members Choice of Texas FCU	Professional Services	60
167	The Reinforced Earth Company	Manufacturing	59
168	Profiles International	Professional Services	57
169	Evans Enterprise	Manufacturing	55
170	Educators Credit Union	Financial	55
171	KWTX Broadcasting	Media	54
172	Kingsdown, Inc.	Manufacturing	53
173	Lark United Manufacturing	Manufacturing	52
174	WRS Group, Ltd.	Manufacturing	52
175	Pepsi Beverage Company	Manufacturing	51
176	Martin Marietta Materials	Manufacturing	50
177	Chase Bank	Financial	50
178	Communities in Schools of the Heart of Texas	Non-Profit	49
179	Best Buy	Retail	48
180	Tejas Logistics System	Logistics	46
181	Polyglass USA, Inc	Manufacturing	46
182	Insurers of Texas	Insurance	40
183	Romark Logistics	Logistics	40
184	Patrick Industries, Inc.	Manufacturing	40
185	Fourfoot, LLC	Distribution	38
186	AMA Nystrom Printing/Finishing	Services	38
187	Brazos Higher Education Service Corporation, Inc.	Financial	36
188	Heart of Texas Council of Governments	Local Government	29
189	Cenikor	Healthcare	29



190	Meals on Wheels Waco	Non-Profit	27
191	Carter Blood Care	Non-Profit	25
192	Curves International	Management	24
19	Lowe Precast, Inc.	Construction	21
194	Durham School Services	Education	15

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About HOTEDD

Home for Entrepreneurs!

Your idea, your new product or service, is something we want in the Heart of Texas. Contact Heart of Texas staff, regional communities, or partners to learn more about making your idea a reality.

Be Part of the Phenomenal Growth of the Heart of Texas!

Low construction and land prices make the Heart of Texas a great place to build. Visit available commercial and industrial sites, tour residential properties, and learn about our communities - there are programs, incentives, and opportunities to help make your dreams a reality!

Diverse Industries

The Heart of Texas Region has historically been a heavily agricultural community. The Waco MSA has developed into a strong industrial and commercial center, with smaller such centers in Hillsboro and Mexia. Access to health care is generally good throughout the region, with two major health centers in McLennan County and rural health centers in each of the other counties.

New Projects

The Heart of Texas is a vibrant, growing community of economic entrepreneurs and leaders across numerous business sectors. Please click on the links below to read about the latest developments!

- **Cottonwood Creek Market**, a 143-acre mixed commercial development in Waco is currently under construction. The site will be anchored by a Cinemark Theater and a Topgolf weatherproof driving range and restaurant.
- **New Fairfield Industrial Park South** with 125 shovel-ready acres ready for development in Freestone County.
- **Hello Bello** chose Waco for its first wholly-owned diaper distribution and manufacturing center and expected to create 100 jobs.
- **Amazon** plans to open its first robotics fulfillment center in Waco in 2021, a 700,000 square-foot facility expected to create 1,000 full-time jobs.

Renewable energy is a rapidly expanding industrial sector in the Heart of Texas region. Companies are currently involved in a number of investments in the area, including:

- OCl's Solar Power project to build a \$104 million solar farm to be operational in Falls County in 2022.
- Engie is close to bringing a 300-megawatt wind farm operational in McLennan and Limestone counties.

Reliable & Skilled Workforce

The labor force in the Heart of Texas region is quite diverse. The historical agriculture industry has resulted in a knowledgeable, dedicated workforce. The area has a robust training environment, covering all employee needs, from community college and Workforce Solution of the Heart of Texas, to unmatched education at Baylor University.

Heart of Texas Economic Development District's Economic Development Strategy

- Increase Innovation and Entrepreneurship
- Brand and Market the Region
- Increase Businesses' Access to Capital
- Increase Economic Development Readiness among Local Jurisdictions
- Foster Key Economic Development Catalyst Projects





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