

MAY 2022

# COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

---

INDIANAPOLIS METROPOLITAN  
PLANNING ORGANIZATION (IMPO)

# Acknowledgments

TIP Strategies, Inc., (TIP) would like to thank the following individuals and organizations for their participation in this planning process.

## IMPO Staff

- Rose Scovel, Principal Planner 1, AICP
- Anna Gremling, Executive Director
- Sean Northup, Deputy Director
- Danielle Gerlach, Planner 1
- Cole Jackson, Financial Analyst 2
- Nicholas Badman, Long-Range Planner

## Funding Partners

- US Economic Development Administration
- Indy Chamber
- Indiana Economic Development Corporation

## Participating Organizations

- 16 Tech
- AARP Indiana
- American Red Cross of Indiana
- American Structurepoint
- Anderson Corporation for Economic Development
- Arts Council of Indianapolis
- Ascension St. Vincent Hospital
- Aspire Johnson County
- Back on My Feet
- Business Ownership Initiative
- Center for Leadership Excellence
- Central Indiana Corporate Partnership
- Central Indiana Regional Development Authority
- City of Carmel
- City of Franklin
- City of Greenwood
- City of Indianapolis
- City of Lebanon
- City of Noblesville
- City of Southport
- City of Westfield
- Cornerstone Environmental Health and Safety, Inc.
- Cummins Inc.
- Duke Energy
- Eastern Star Jewel Human Services Corporation
- EmployIndy
- Engaging Solutions
- Fifth Third Bank
- First Merchants Bank
- Hamilton County Commissioners
- Hamilton County Economic Development Corporation
- Hancock County Commissioners
- Hancock County Economic Development Council
- Health & Hospital Corporation
- Hendricks County Commissioners
- Hendricks County Economic Development Partnership
- Heritage Group
- Indiana Economic Development Corporation
- Indiana Institute for Working Families
- Indiana Municipal Power Association
- Indiana Union Construction Industry
- Indiana University Health
- Indiana University Public Policy Institute
- Indianapolis Neighborhood Housing Partnership
- Indianapolis Urban League
- Indy Black Millennials
- Indy Chamber
- Indy Hunger Network
- Indy Partnership
- Indy East Promise Zone
- IndyGo
- InnoPower
- Indiana University-Purdue University Indianapolis (IUPUI)
- Ivy Tech Community College of Indiana

### Participating Organizations (Continued)

- Jewish Federation of Greater Indianapolis
- JoAnna M. Brown and Associates/Sagamore Institute/Mitchell Market Analysts, Inc.
- John Boner Neighborhood Centers
- KeyBank
- Lauth
- Lumina Foundation
- Madison County Council of Governments
- Marian University
- MIBOR REALTOR Association
- Morgan County Commissioners
- Morgan County Economic Development Corporation
- OneAmerica Financial Partners, Inc.
- PNC Bank
- Prosperity Indiana
- Purdue University, Department of Technology Leadership & Innovation
- PwC
- Quality Connection of Central Indiana
- Region 5 Workforce Development Board, Inc.
- Renew Indianapolis, Inc.
- Salesforce
- Southeast Neighborhood Development, Inc. (SEND)
- Town of Bargersville
- Town of Brownsburg
- Town of Cumberland
- Town of McCordsville
- Town of Plainfield
- Town of Whitestown
- United Way of Central Indiana
- Urban Land Institute Indiana
- Vectren
- Veridus Group
- Vincennes University
- Visit Indy
- WorkOne (Regions 5 and 12)

### Strategy Committee

- Bunmi Akintomide
- Mike Ash
- Dr. Stacy Atkinson
- Hannah Bast
- Megan Baumgartner
- Teresa A. Bennett
- Melissa Benton
- Brian Bilger
- Ben Bontrager
- Michelle Boyd
- Anthony Bridgeman
- Jerry Bridges
- Dr. JoAnna Brown
- Matt Carter
- Brad Coffing
- Bryan Conn
- Andy Cook
- Debbie Cook
- Mayor Jim Cooney
- John Corbin
- Joe Csikos
- Commissioner Denny Dawes
- Mike Dellinger
- Aaron Dixon
- Emil Ekiyor
- Debbie Evans
- Leigh Riley Evans
- Greg Fennig
- Mark Fisher
- Jessica Fraser
- Mitch Frazier
- Tonya Galbraith
- Pat Gamble-Moore
- Adairius Gardner
- Larry Gigerich
- Brian Gildea
- Juan Gonzalez
- Julie Goodman
- Joe Hanson
- Commissioner Mark Heirbrandt
- Mackenzie Higgins
- Mike Hollibaugh
- David Holt
- Dr. Scott Hutcheson
- Sarah Iglehart
- Joe Jasin
- John Jessup
- Dr. Mia Johnson
- Mike Jones
- Brad Kelsheimer

### Strategy Committee (Continued)

- Jason King
- Kirk Klabunde
- Drew Klacik
- Andrew Klinger
- Angela Carr Klitzsch
- Emily Krueger
- Keith Lauter
- Deb Lawrence
- David Lewis
- Krista Linke
- Jeff Linkon
- Ben Lipps
- Jessica Love
- Christian Maslowski
- Tony Mason
- Mike McBride
- Lawrence McCormack
- Katie Meares
- Nathan Messer
- Josh Messmer
- Genevieve Miller
- Mark Miller
- Jennifer Milliken
- Kelli Mirgeaux
- Leslie Montgomery Bean
- Andrew Murray
- Mayor Mark Myers
- Todd Pederson
- Lun Pieper
- Addison Pollock
- Rick Proctor
- Patty Prosser
- Lance D. Ratliff
- Jim Rawlinson
- Georgiana Reynal
- Nathan Ringham
- Jim Robinson
- Victoria Ross-Frost
- Jack Russell
- Julia Saltsgaver
- Marisol Sanchez
- Karin Sarratt
- Megan Savage
- Erin Schneider
- Aryn Schounce
- Angela Smith Jones
- Randy Sorrell
- Rob Sparks
- James Taylor
- Evan Tester
- Mike Thibideau
- Brooke Thomas
- Dr. Stacy Townsley
- David Tucker
- Mark Wasky
- Molly Whitehead



**TIP Strategies, Inc.**, is a privately held economic development consulting firm with offices in Austin and Seattle. TIP is committed to providing quality solutions for public sector and private sector clients. Established in 1995, the firm's primary focus is economic development strategic planning.

### Contact

TIP Strategies  
2905 San Gabriel Street, Suite 309, Austin, TX 78705  
PH: +1 512 3439113  
[www.tipstrategies.com](http://www.tipstrategies.com)

### Consulting Team

Jon Roberts, Managing Partner  
Elizabeth Scott, Senior Consultant  
Katrina Parkey, Consultant

# Contents

- 1. INTRODUCTION ..... 1
  - THE REGION ..... 2
  - PLANNING CONTEXT ..... 3
  - SUMMARY ..... 5
- 2. ECONOMIC RESILIENCE FRAMEWORK ..... 6
  - OVERVIEW ..... 7
  - DEFINING RECOVERY AND RESILIENCE ..... 7
  - RESILIENCE FOCUS AREAS ..... 7
  - MOVING FORWARD ..... 9
- 3. KEY FINDINGS ..... 10
  - THEMES AND TAKEAWAYS ..... 11
  - ECONOMIC CONTEXT ..... 11
  - OCCUPATIONAL RISK TOOL ..... 16
  - QUALITATIVE INPUT ..... 17
  - SWOT ANALYSIS ..... 18
- 4. STRATEGIC PLAN ..... 19
  - GOAL 1. TALENT ..... 20
  - GOAL 2. INNOVATION ..... 23
  - GOAL 3. PLACE ..... 26
- APPENDIX A . EVALUATION FRAMEWORK ..... 29
  - EVALUATION FRAMEWORK ..... 30
- APPENDIX B . STAKEHOLDER ENGAGEMENT ..... 31
  - STAKEHOLDER ENGAGEMENT ..... 32

# 1. Introduction

---

# The Region

Known as the Crossroads of America for its prime location in the US, the Central Indiana region—Boone, Hamilton, Hancock, Hendricks, Johnson, Madison, Marion, and Morgan Counties—has a wealth of assets. Home to Indianapolis, the 15th largest city in the US, the region has a long history as the sports capital of America. Events like the Indy 500 and the headquarters of the National Collegiate Athletic Association (NCAA) bring international recognition in their wake. Annually, the region hosts executives, athletes, artists, and visitors from around the world through conferences, conventions, and other events, which put Central Indiana in the spotlight.

The region is widely recognized for its diverse industries and major employers, including Rolls-Royce, Roche Diagnostics, Corteva Agriscience, Simon Property Group, Allison Transmission, CNO Financial Group, Carter Express, Eli Lilly, Cummins, and Salesforce. As a result, Central Indiana residents have a wide range of job opportunities. In addition, the area is fueling cutting-edge technological growth with the help of the 16 Tech Innovation District and strong educational anchors, like Indiana University–Purdue University Indianapolis (IUPUI), University of Indianapolis, Marian University, Ivy Tech Community College, and the Indiana Internet of Things Lab in Fishers. Major hospital systems and healthcare providers, such as Community Health Network, Ascension St. Vincent Hospital, Indiana University Health, Eskenazi Health, and Franciscan Health, are significant regional employers and leaders in medical innovation. The Central Indiana region also benefits from the state's image of Hoosier hospitality. Its communities offer a relatively affordable cost of living; cultural, arts, and entertainment options; and a wide range of outdoor recreational amenities. Recent infrastructure investments, including expanded public mass transit routes, help bolster this high quality of life.

Despite these advantages, Central Indiana faces major hurdles to economic growth—challenges requiring urgent attention. Among these challenges is a growing economic divide. Life can look markedly different across the eight-county region. Educational attainment rates, median incomes, and housing costs vary dramatically among the counties.

Both nationally and for Central Indiana, the market for talent is becoming increasingly competitive. The Great Resignation is decimating the workforce, fueled not only by anxiety about the COVID-19 pandemic and the virus's many variants, but also by concern over stagnant wages and rising costs. Despite the region's diverse industries, job opportunities go unfilled. In particular, the pandemic took a heavy toll on the region's hospitality sector, causing conventions and events to disappear overnight. Service industries, typically a reliable entry point for many workers, can no longer be counted on to ensure job advancement. Central Indiana must rethink its training programs to prepare students and displaced workers for jobs requiring higher skill levels. At the same time, the region must accelerate efforts to attract workers on a national level.

Some communities across the region, both urban and rural, suffer from the digital divide, with a higher percentage of residents lacking high-speed internet access, digital literacy skills, and broadband-ready devices. Too often, economic development efforts rely solely on business attraction and growth to increase the number of jobs in a community. In this economy, job creation cannot be the primary objective of a regional strategy. Emphasis must be placed on workforce development and skills training to improve access to good and promising jobs, innovative transit solutions to connect the region, and quality-of-life initiatives that attract and retain workers.

Despite the uneven recovery from the pandemic, the region can overcome these economic development challenges. This plan provides a roadmap to guide local economic development efforts to build an inclusive economy. It offers Central Indiana the opportunity to leverage its strengths, to expand and scale effective programs, and to address its weaknesses through a long-term and coordinated effort. Community leaders are the key. If equitable growth and regional connectivity are embraced, Central Indiana can improve its competitive advantage at a national and international level.

# Planning Context

In March 2021, the Indianapolis Metropolitan Planning Organization (IMPO) contracted TIP Strategies, Inc., (TIP) to develop a comprehensive economic development strategy (CEDS) under the guidelines of the US Economic Development Administration (EDA). The CEDS serves as a guide for economic development efforts across the Central Indiana region including Boone, Hamilton, Hancock, Hendricks, Johnson, Madison, Marion, and Morgan Counties. With funding from the EDA and grant support from the Indy Chamber and the Indiana Economic Development Corporation, this plan is designed to focus the region's efforts to be more strategic and collaborative in responding to new economic development opportunities and addressing regional challenges. Though a CEDS concentrates on strategies to be implemented over the next five years, the impacts of the Central Indiana region embracing its interconnectedness and working collaboratively to implement these strategies will have a much longer-lasting impact. This CEDS meets the requirements set forth by the EDA to designate the eight-county region as an Economic Development District (EDD).

Following TIP's three-phase planning process, the project launched in early 2021 with the discovery phase. This first phase consisted of data collection and analysis, roundtable participant input, and interviews with stakeholders to identify the region's economic development challenges and assets. Insight from this work, in addition to regular input from a regional CEDS Steering Committee, formed the foundation of the plan. The second phase of the project aligned the CEDS vision, guiding principles, and plan structure with the themes and opportunities that emerged from the prior phase. With additional feedback from 12 working group sessions, strategies and action items were grouped into three goal areas: talent, innovation, and place. These goals, along with the strategies and action items, leverage other regional planning efforts for greater coordination, collaboration, and impact. The third and final phase of the planning process, the implementation phase, focused on co-creation of prioritized strategies, consensus building with identified partners, and shared execution of the plan.

This CEDS should be viewed as a living document that invites revisions and refinements as economic conditions in the Central Indiana region change. With the implementation matrix, provided as a separate deliverable, the regional CEDS Steering Committee and other partners should meet on a regular basis to track implementation progress and performance metrics to adapt as needed.

## Vision

As the cornerstone for a comprehensive economic development strategy, a strong vision statement provides the basis for the plan to capitalize on opportunities and address vulnerabilities. The vision statement describes where the region hopes to be, with the strategies and actions in the plan moving Central Indiana toward this vision. In partnership with community leaders and stakeholders across the eight-county region, the following vision statement was developed.

***The Central Indiana CEDS region is committed to partnerships that prioritize equitable growth and regional connectivity to ensure vibrant and resilient growth.***






## Guiding Principles and CEDS Structure

The regional CEDS Steering Committee identified four guiding principles as touchstones for current and future initiatives. These guiding principles, described in further detail below, are the connections uniting all the goals, strategies, and action items throughout the CEDS. Given its importance, the subject of recovery and resilience appears as a guiding principle and as part of the economic resilience framework outlined in the next section.

- **Partnerships and Regional Alignment.** Align regional efforts to advance economic opportunity for all and build partnerships across the Central Indiana region.
- **Equitable Growth.** Seek to understand, address, and dismantle the root causes of outcome disparity along with the historic and existing barriers to participation in the local economy.
- **Recovery and Resiliency.** Target efforts that prepare the region to avoid, withstand, and recover from economic shocks and natural disasters.
- **Connectivity.** Embrace the interconnectedness of Central Indiana and the underlying foundation tying economic development efforts together.

Guided by the four principles, the plan structure divides strategies and action items under three goal areas: talent, innovation, and place.

Figure 1. CEDS Structure

	 <b>Talent</b>	 <b>Innovation</b>	 <b>Place</b>
Goal	Develop, attract, and retain a strong, diverse talent pool by building on the collaboration among Central Indiana's education and training organizations, workforce development programs, and private sector employers.	Create a robust network of forward-thinking initiatives around business recruitment, entrepreneurial support, research and development, and technology adoption to fuel innovative growth.	Establish an attractive and welcoming environment for residents and tourists through a holistic approach to quality-of-place initiatives that draws on cross-sector partnerships.
Strategies	<ul style="list-style-type: none"> <li>• Workforce Development</li> <li>• Higher Education</li> <li>• Talent Retention</li> <li>• Talent Attraction</li> <li>• PreK-12</li> <li>• Childcare</li> </ul>	<ul style="list-style-type: none"> <li>• Target Sectors</li> <li>• Business Development</li> <li>• Small Business</li> <li>• Entrepreneurship</li> <li>• Technology Transfer</li> </ul>	<ul style="list-style-type: none"> <li>• Infrastructure</li> <li>• Environment &amp; Natural Resources</li> <li>• Downtown Development</li> <li>• Housing</li> <li>• Outdoor Recreation</li> <li>• Tourism</li> </ul>

Source: TIP Strategies, Inc.

## Summary

This plan is designed to guide economic development efforts across the Central Indiana region over the next five years. The three goals in this CEDS—talent, innovation, and place—are structured to complement and build on one another to create a holistic approach to economic development. Altogether, this plan meets the EDA's requirements to designate the eight-county region as an EDD.

The plan is also designed to allow regional leaders to act swiftly as economic conditions change. This adaptability will require local organizations to maintain cross-sector partnerships and to act in a coordinated manner. Whether building a more competitive local talent pool, supporting innovative entrepreneurs, or leveraging funding opportunities, regional collaboration and coordination will be essential to the successful implementation of the CEDS.

## 2. Economic Resilience Framework

---

## Overview

The impacts of economic shocks and chronic stressors, whether they be from an economic recession or a natural disaster, do not stop at city or county lines. The COVID-19 pandemic is a clear example, creating devastating effects on economies around the world. Economic growth had already slowed due to trade policy and immigration restrictions enacted before the onset of the COVID-19 pandemic. The supply chain challenges caused by this combination of events is being felt in every community and nearly every industry. The COVID-19 pandemic has compounded these issues and accelerated others. The growing prominence of broadband for remote workers is one obvious example of the cascading effects of the pandemic. Meanwhile as climate change increases the frequency and intensity of rainfall, as well as atypical and severe weather, the reality of this new normal is of immediate economic importance.

Economic disruptions and disasters do not stop at jurisdictional boundaries. The same is true of resiliency planning. A region's economic prosperity is directly dependent on its ability to prevent, withstand, and quickly recover from major disruptions to its economic base. Economic development plans *must* address recovery and resiliency. Because of its regional scope, broad stakeholder engagement, and emphasis on capacity building, it is particularly valuable for a CEDS to make a region more resilient and better positioned to plan for, respond to, and recover from economic shocks, stressors, and disruptions.

## Defining Recovery and Resilience

In 2015, the EDA released updated content guidelines for a CEDS, which included a requirement to address economic resilience. This shift recognized the direct connection between a region's economic prosperity and its ability to deal with disruption. An emphasis on resilience is particularly fitting now that economies around the world have been forced to deal with a series of economic shocks.

Traditionally recovery has been defined as a return to previous economic conditions following a disruption to the business and employment base. But it has become increasingly clear that regardless of whether the disruption resulted from the loss of a major employer, or a natural disaster, or a health crisis, returning to an earlier status quo may not be possible. The Central Indiana region knows this all too well.

Resiliency, on the other hand, can be defined as the ability to recover from an economic shock as well as the ability to withstand or even to avoid the shock altogether.<sup>1</sup> Resiliency is forward-thinking, with an aim to bounce back and recover from these shocks while also building back better for the future. It involves enhancing the capabilities and capacities of communities to better withstand future stressors and to fortify the long-term economic durability of a region. A well-crafted strategy, such as a CEDS, can better position a region for a sustainable recovery and make it more resilient in the event of future shocks.

## Resilience Focus Areas

A successful economic resilience framework relies on both steady-state and responsive initiatives. Steady-state initiatives are long-term strategies that aim to enhance a region's ability to withstand or avoid a shock, while responsive initiatives aim to establish capacities for a region to be responsive following a shock.

---

<sup>1</sup> US EDA. "Economic Resiliency." [www.eda.gov/ceds/content/economic-resilience.htm](http://www.eda.gov/ceds/content/economic-resilience.htm).




With these guidelines, this economic resilience framework is designed to serve as a roadmap for the Central Indiana region to respond in the short term following an economic shock and to implement long-term processes that improve the region’s capabilities and capacities to better withstand future stressors. The framework centers on three focus areas described below and illustrated in Figure 2.

- **Talent: Build a resilient workforce.** Building a resilient workforce is a key component of recovery and resiliency. By strengthening the skilled talent pipeline and developing clear career pathways, Central Indiana residents can be better positioned to shift between jobs or industries if their core employment is threatened. This strategic area is complementary to the talent goal outlined in Figure 1. It calls on strategies and actions needed to develop the local workforce, especially those who have been historically underserved or disconnected from the modern economy, in partnership with support organizations.
- **Business: Diversify the industry base and promote business continuity.** This strategic area concentrates on providing support to businesses before, during, and after an economic disruption or shock to promote business continuity. This concept depends on business retention and expansion programs being adaptable to meet the changing needs of local businesses. Assisting businesses with tech adoption and modernization processes is one way to do that. Meanwhile, business recruitment efforts can help to ensure a diverse industry base and strong supply chains that can provide stability during economic downturns that disproportionately impact any single industry.
- **Connectivity: Expand strong communication channels and harden infrastructure.** Access to both reliable communication channels and utility services is essential in the aftermath of a shock. One strategy to meet this need is to ensure redundancy in telecommunications and broadband networks. Additionally, hardening infrastructure, from electric and natural gas capacity to water and wastewater systems, helps ensure that Central Indiana residents have access to reliable services when they need them most.

By bolstering the region’s economic systems, including retraining the local workforce and modernizing infrastructure systems, the Central Indiana region will be better positioned to recover and withstand economic shocks. While every strategy and action item in the CEDS touches on the concepts of recovery and resiliency, certain strategies are highlighted in Figure 2 because they support the skills, diverse industries, and connectivity needed to adapt to changing economic conditions.

**Figure 2. Economic Resilience Framework**

Selected CEDS recommendations that support recovery and resilience—strategy number in ( )

	<p><b>Talent</b></p> <p><i>Build a resilient workforce.</i></p>	<ul style="list-style-type: none"> <li>• Strengthen the skilled talent pipeline (1.1).</li> <li>• Develop clear career pathways for residents (1.2).</li> <li>• Help workers overcome employment barriers (1.3).</li> </ul>
	<p><b>Business</b></p> <p><i>Diversify the industry base and promote business continuity.</i></p>	<ul style="list-style-type: none"> <li>• Strengthen existing businesses (2.1).</li> <li>• Bolster business recruitment efforts (2.1).</li> <li>• Assist small businesses with tech adoption and modernization processes (2.3).</li> </ul>
	<p><b>Connectivity</b></p> <p><i>Expand strong communication channels and harden infrastructure.</i></p>	<ul style="list-style-type: none"> <li>• Expand broadband infrastructure (2.5).</li> <li>• Modernize regional infrastructure systems (3.6).</li> </ul>





Source: TIP Strategies, Inc.

# Moving Forward

The framework is designed in a way that allows regional leaders to act swiftly as economic conditions change. Responsive initiatives, regional collaboration, and coordination are critical. It is important for community leaders to maintain cross-sector partnerships and to act in a coordinated manner. Whether supporting business continuity or strengthening communication channels, collaboration across jurisdictional boundaries is essential.

Ultimately, the Central Indiana region's shared desire is to build a resilient economy better able to withstand economic stresses. This shared desire comes at a unique moment in history. Federal funds, coupled with emerging technologies, will allow leaders to address long-neglected infrastructure needs as well as social inequities, each of which influence an area's ability to recover from disruption. Central Indiana will have additional resources to build a flexible workforce, diversify the industry base, and harden infrastructure, all of which can create a more resilient and competitive economy.

**Figure 3. Resiliency Tools and Resources**

	Name	Description	Link
<b>General</b> 	<b>Restore Your Economy (IEDC* &amp; EDA)</b>	Website and planning materials with resiliency strategies and best practices.	<a href="https://restoreyoureconomy.org">restoreyoureconomy.org</a>
	<b>US Climate Resilience Toolkit</b>	Actionable steps, case studies, and tools to reduce climate-related risks and build resilience for businesses and communities.	<a href="https://toolkit.climate.gov">toolkit.climate.gov</a>
	<b>Flood Factor</b>	Online mapping tool designed to show property flooding risks due to a changing climate.	<a href="https://floodfactor.com">floodfactor.com</a>
<b>Talent</b> 	<b>Rework Community Insights Monitor</b>	Information about industries and occupations most prevalent within a regional economy, how many jobs are accessible to workers without a bachelor's degree, and available education or training programs.	<a href="https://www.atlantafed.org/cweo/data-tools/rework-community-insights-monitor">www.atlantafed.org/cweo/data-tools/rework-community-insights-monitor</a>
	<b>Invest Atlanta</b>	ONE ATL is an example of a best practice for an economic mobility, recovery, and resiliency plan.	<a href="https://www.investatlanta.com/economic-mobility">www.investatlanta.com/economic-mobility</a>
<b>Business</b> 	<b>Small Business Anti-Displacement Toolkit</b>	Tools to protect small businesses against displacement.	<a href="https://antidisplacement.org/toolkit/">antidisplacement.org/toolkit/</a>
	<b>US Small Business Administration Recovery Hub</b>	Resources to sustain small businesses when economic shocks or natural disasters occur.	<a href="https://www.sba.gov/funding-programs/disaster-assistance/recovery-hub">www.sba.gov/funding-programs/disaster-assistance/recovery-hub</a>
	<b>American Red Cross Ready Rating</b>	Program that helps businesses, schools, and organizations become prepared for disasters and other emergencies.	<a href="https://readyrating.org">readyrating.org</a>
<b>Connectivity</b> 	<b>Indiana Broadband</b>	Information and resources related to broadband expansion and potential funding opportunities.	<a href="https://www.in.gov/indianabroadband/">www.in.gov/indianabroadband/</a>
	<b>Greensburg Sustainable Comprehensive Plan</b>	An example of a best practice for incorporating green infrastructure and renewable energy resources.	<a href="https://www.greensburgks.org">www.greensburgks.org</a>
	<b>Center for Climate and Energy Solutions</b>	Resources for cities on resilience planning, including best practices for hardening infrastructure.	<a href="https://c2es.org">c2es.org</a>

Source: TIP Strategies, Inc.

\*International Economic Development Council.

# 3. Key Findings

---

## 3.1. Summary of Findings

### 3.1.1. Key Findings

#### 3.1.1.1. Key Findings

#### 3.1.1.2. Key Findings

#### 3.1.1.3. Key Findings

#### 3.1.1.4. Key Findings

#### 3.1.1.5. Key Findings

#### 3.1.1.6. Key Findings

#### 3.1.1.7. Key Findings

#### 3.1.1.8. Key Findings

## Themes and Takeaways

Over the course of the planning process, common themes emerged from the quantitative analysis, one-on-one interviews, and roundtable discussions. These themes are outlined in this section, beginning with findings from an analysis of economic and demographic factors and an examination of the impacts of the COVID-19 pandemic crisis on the region's labor force in terms of risk to health and earnings. Following the overview of the stakeholder and public engagement process, the section concludes with a summary of Central Indiana's strengths, weaknesses, opportunities, and threats. This analysis, commonly referred to as a SWOT analysis, was gleaned from quantitative and qualitative findings.

## Economic Context

As part of the planning process, TIP conducted a broad analysis of the economic, social, and environmental conditions that influence economic vitality and relate to the region's overall competitiveness. The full data analysis for each county in the CEDS region, as well as comparisons to statewide and national data, can be found in the *Central Indiana CEDS Region Economic Explorer*, an interactive Tableau workbook provided separately to the IMPO.<sup>2</sup> Ultimately, the findings of this analysis, summarized here, informed and guided the direction of the CEDS.

### *The region is growing rapidly with notable differences among counties.*

The region has seen steady growth since the late 1980s, expanding its population by nearly 50 percent in the past three decades. Marion County continues to be the most populous county with about one-half of the regional population. Hamilton County's steady and more accelerated growth makes it a significant driver as well with more than 17 percent of the total population. Regional diversity tends to be split between Marion and the outlying counties. While more than one-quarter (27.6 percent) of Marion County residents are Black or of African descent, the remaining counties tend to be much less diverse and have more homogenously White populations than the state overall. Educational attainment also varies across the region. Nearly 60 percent of Hamilton County residents have a bachelor's degree or higher, a rate more than double that of the state. The less populous Boone County shares this high educational attainment rate, with about one-half of residents holding at least a bachelor's degree, while Madison County lags with fewer than one-fifth (18 percent) of residents attaining this level of education. Differences in educational attainment also correlate with median household income. Hamilton and Boone Counties enjoy high annual incomes with more than one-half of households earning \$80,000 annually—well above state and national medians—while Madison and Marion Counties sit below \$50,000. The counties also have different household compositions. Nearly 40 percent of Hamilton County households have children, compared to less than 25 percent of Marion County households.

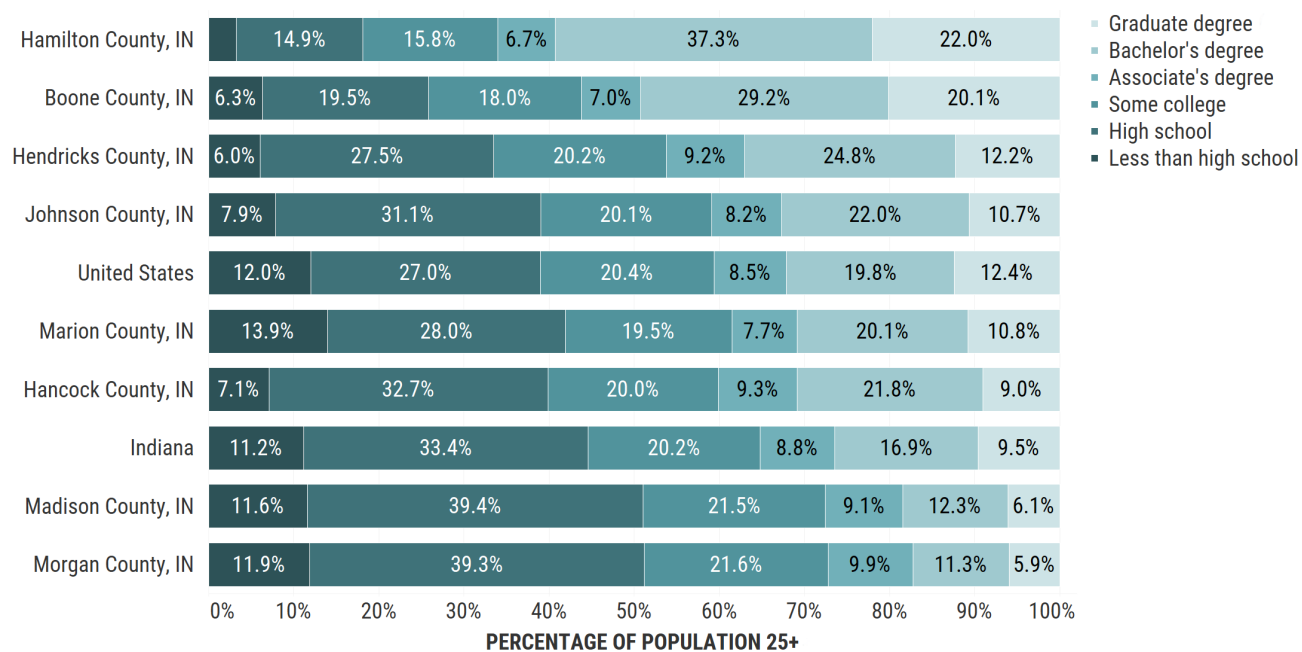
---

<sup>2</sup> The *Central Indiana CEDS Region Economic Explorer* is available for download via the IMPO website at [https://d16db69sqbolil.cloudfront.net/mpo-website/downloads/Regional/Regional-economic/Tableau-Export\\_Final.zip](https://d16db69sqbolil.cloudfront.net/mpo-website/downloads/Regional/Regional-economic/Tableau-Export_Final.zip).



**Figure 4: Educational Attainment, 2019**

Population (age 25+ years) by share of educational attainment

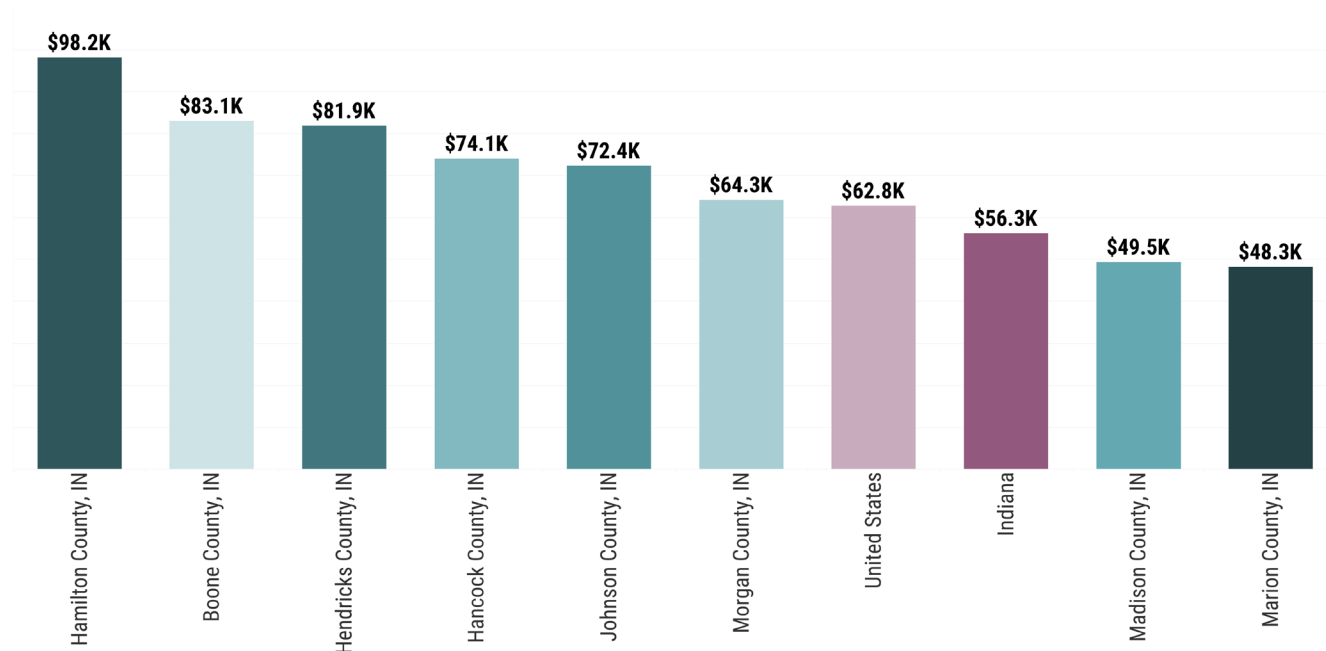


Sources: American Community Survey, 2019 five-year sample; TIP Strategies, Inc.

Notes: Educational attainment only measured for population 25 and older. High school includes equivalency. Some college indicated no degree was received. Graduate degree includes professional degrees and doctoral programs.

**Figure 5: Household Income, 2019**

Median household income



Sources: American Community Survey, 2019 five-year sample; TIP Strategies, Inc.

### *Housing affordability and technology access may be siloed by county.*

Median housing costs across the region tend to follow the same patterns of income. Hamilton and Boone Counties' median home is valued well over \$200,000—just above the national median—while owner-occupied homes in Marion and Madison Counties are valued about one-half as much at \$137,000 and \$97,000, respectively. Because median housing costs tend to track with median household incomes in the region, housing is generally affordable on a county-by-county basis with less than one-quarter of residents classified as cost burdened (paying more than 30 percent of household income on housing expenses) compared to more than 27 percent nationally. Hamilton County's recent population growth is also reflected in its housing stock where nearly 80 percent of housing units were built after 1980, compared to about 40 percent in Marion County and across Indiana more generally. Moreover, 45 percent of Hamilton County housing was built in the past 20 years, compared to about 16 percent at the state level. Low housing vacancy rates in Hamilton, Hendricks, and Hancock Counties also correspond with higher median housing costs, suggesting that demand has outpaced supply and driven up housing costs. County differences in housing across the region can also be viewed through the lens of equitable connectivity. About 13 percent of households in Marion and Madison Counties do not have computer access, a percentage that is higher than state (11.3 percent) and national (9.7 percent) levels, but this challenge is not shared by their regional peers. Additionally, more than one-fifth of households in these two counties do not have access to high-speed internet connections, further accentuating the divide between these and other counties in the region.

**Figure 6: Housing Cost, 2019**

Median home value among owner-occupied units and median monthly rent



Sources: American Community Survey, 2019 five-year sample; TIP Strategies, Inc.

**Figure 7: Connectivity, 2019**

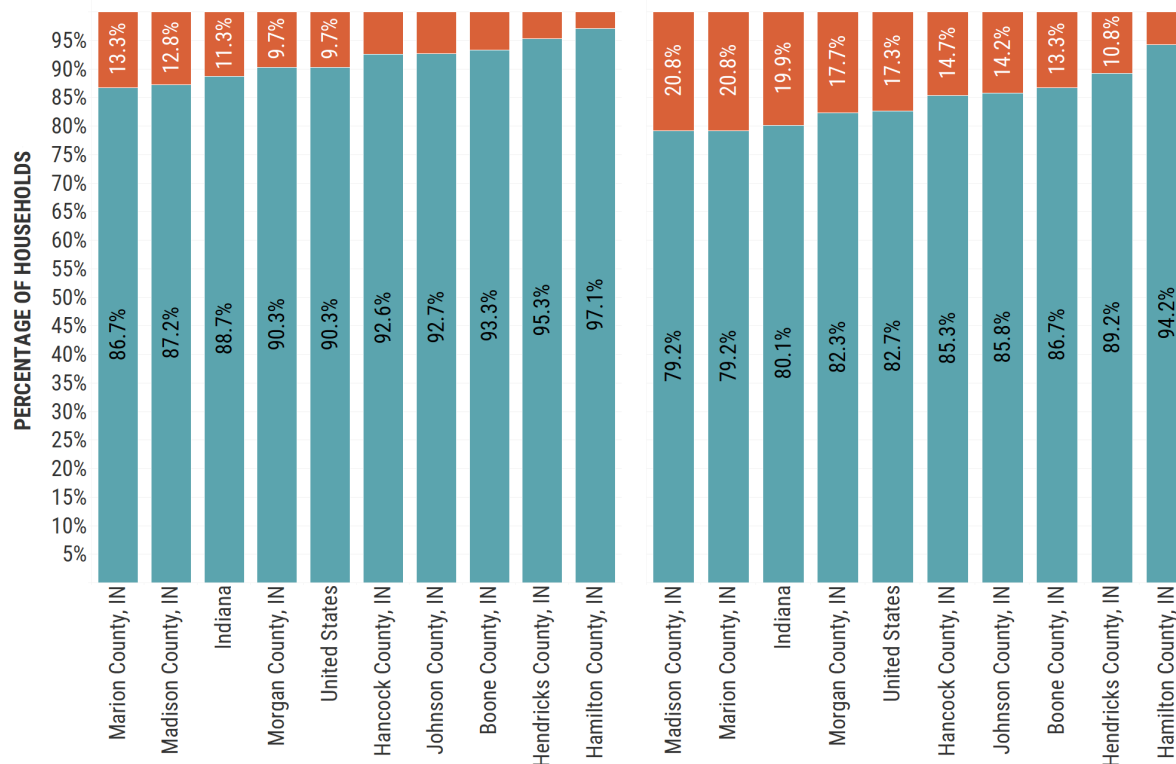
**COMPUTER ACCESS**

Share of households with access to a computer at home

**INTERNET ACCESS**

Share of households with access to broadband internet at home

■ No access  
■ Access



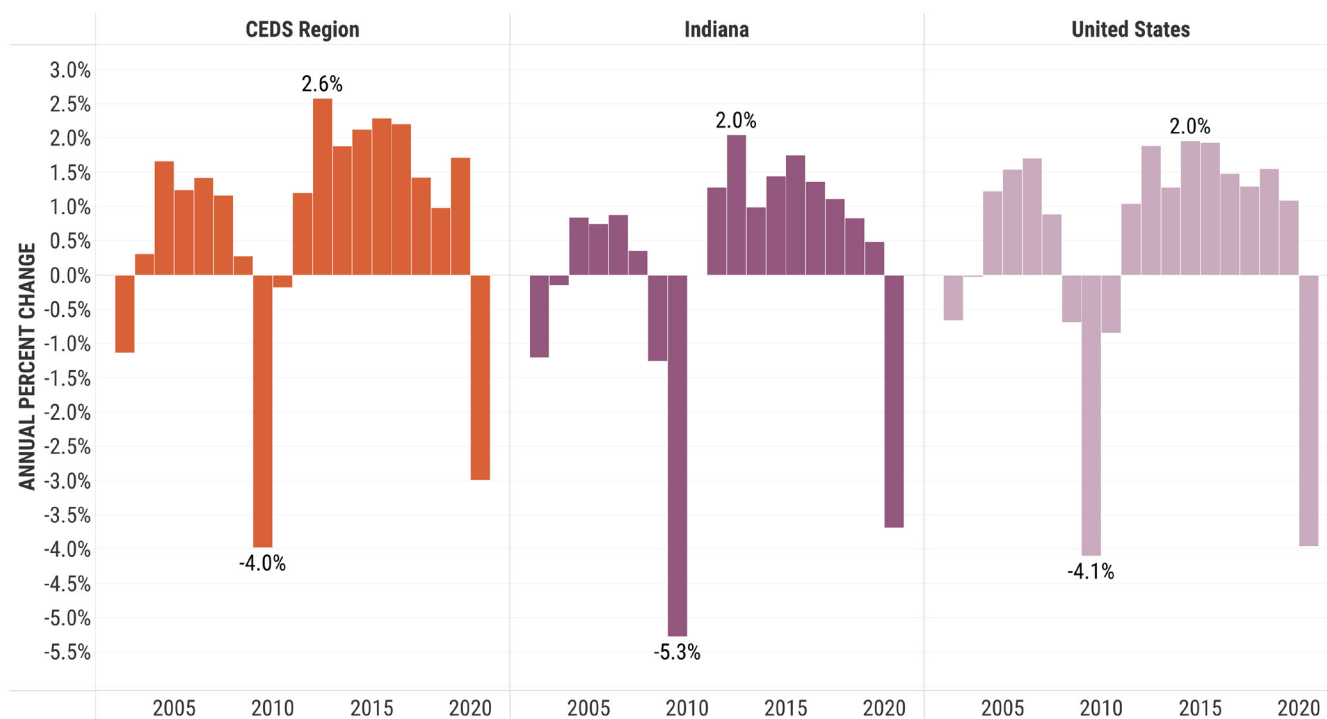
Sources: American Community Survey, 2019 five-year sample; TIP Strategies, Inc.

Notes: Computer access refers to whether anyone in the household owned or used a computer at the housing unit including desktops, laptops, smartphones, tablets, other portable wireless computers, or some other type of computer. Internet access refers to whether someone in the household uses or can connect to the internet, regardless of whether or not they pay for the service. This includes housing units where someone pays to access the internet through a data plan for a smartphone; a broadband internet service such as cable, fiber optic or DSL; satellite; dial-up; or other type of service. Others may live in a city or town that provides free internet service for their residents or in a college or university that provides internet service.

**Strong pre-COVID-19 employment growth may have strengthened resilience.**

The region has seen consistent employment growth in the inter-recessionary period between 2011 and 2019. In fact, the Central Indiana job base has grown more than 18 percent since the turn of the millennium, though this growth has somewhat underperformed the regional population growth rate during the same period (24.2 percent). Regional employment contracted by 3 percent in 2020—a smaller drop than state and national levels (3.7 and 4 percent, respectively). As with other trends, the COVID-19-induced employment contraction in 2020 did not apply equally in all counties in the region. Marion County saw the sharpest drop of 4.3 percent in 2020 (a loss of more than 28,000 jobs), while surrounding counties saw less severe decreases. Additionally, Boone and Hendricks Counties saw employment gains during this period, though small in magnitude given their smaller populations and employment centers (a gain of 3,000 jobs between the two counties, mostly in the transportation and warehousing sector). These two counties' strong, consistent employment growth over the past two decades may have afforded their employment centers more resilience during the COVID-19-induced employment shocks of 2020, as they have doubled the number of county jobs since 2001. The connectivity divide among counties in the region also coincides with work-from-home rates. Hamilton, Boone, and Hendricks Counties, among the most connected, have above-average shares of workers who worked from home (9.0, 6.9, and 5.8 percent, respectively), compared to Marion and Morgan Counties, which sit below national and state levels with 3.5 percent of workers working from home.

**Figure 8: Annual Percentage Change in Employment by Region**



Source: US Bureau of Labor Statistics; Emsi Burning Glass 2021.2—Quarterly Census of Employment and Wages (QCEW) Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Notes: The Central Indiana CEDS region includes the following eight counties: Boone, Hamilton, Hancock, Hendricks, Johnson, Madison, Marion, Morgan. Minimum and maximum percentage change years are labeled.

### Healthcare and retail jobs grow while manufacturing fluctuates.

Healthcare and retail continue to be the dominant regional employment sectors. However, retail employment has been on a downward trend since 2017 and has contracted by more than 10 percent in three years, while healthcare has steadily grown every year between 2001 and 2019. In recent years, accommodation and food services and administrative services had overtaken manufacturing as major regional employment sectors. However, the effects of the COVID-19 recession hit these sectors especially hard, while manufacturing suffered fewer losses and regained its position as the third major sector in the regional employment landscape. Most sectors experienced declines or stagnant growth between 2019 and 2020, though there were gains in transportation and warehousing and professional services, continuing trends that have been prevalent since recovery from the Great Recession (2007–2009).

More detailed industry analysis can be undertaken through an examination of the *Central Indiana CEDS Region Economic Explorer* available on the IMPO Central Indiana CEDS web page.<sup>3</sup> This interactive data visualization tool includes information on the Central Indiana region’s competitiveness and factors that influence its economic vitality.

<sup>3</sup> The *Central Indiana CEDS Region Economic Explorer* is available for download via the IMPO website at [https://d16db69sqbolil.cloudfront.net/mpo-website/downloads/Regional/Regional-economic/Tableau-Export\\_Final.zip](https://d16db69sqbolil.cloudfront.net/mpo-website/downloads/Regional/Regional-economic/Tableau-Export_Final.zip).

# Occupational Risk Tool

In the COVID-19 pandemic era, communities that understand the pain points of their local labor force are better equipped to respond effectively to the evolving needs of resident workers. TIP's proprietary occupational risk tool combines data on jobs and residents to help users understand which workers are at risk in the current environment, where those workers are located, and their demographic context.

To understand the risks that workers are likely to face in the current crisis, the tool assigns two scores to workers across more than 700 occupations, measuring risk to personal health from the COVID-19 pandemic and the economic risk from job or income loss. The two scores are used to plot a position for each occupation that illustrates the amount of risk to earnings and health that workers may experience as a result of their job. These vulnerabilities can be examined by race/ethnicity, gender, and earnings using an interactive data visualization delivered separately. The results can be mapped by ZIP Code to understand the geographic distribution of at-risk workers. Information can be disaggregated by individual occupations within major occupational groupings as well as by major industry sectors.

## ***Roughly one in three regional workers are in jobs with a high risk to earnings and to personal health.***

More than one-third (36.4 percent) of all workers (totaling over one million) living in the eight-county Central Indiana CEDS region are in the highest risk quadrant with relatively high risk to both personal health and earnings. This share is above the national rate of 31.1 percent due, in part, to the large number of workers in the region in occupation groups that saw elevated unemployment during the COVID-19 pandemic, such as production, food service, office and administrative support, and management workers. Some of the largest occupations in these groups include over 40,000 office clerks and customer service representatives, 26,000 fast food and counter workers, 16,000 general and operations managers, and 13,000 assemblers and fabricators.

## ***Workers in low-wage jobs face disproportionately higher risks to both their earnings and health.***

Risk is also disproportionately distributed among low-wage jobs. While 46 percent of the jobs in the region pay less than \$20 per hour, these jobs comprise 83 percent of jobs with the highest level of risk to both earnings and personal health. Often, Black, Indigenous, and people of color (minoritized populations) are disproportionately employed in these low-wage jobs. Not only are minoritized populations employed in jobs with greater exposure to risks, but they are also earning less in those jobs.

## ***The number of workers at risk varies considerably across the region.***

Workers who face the highest and lowest risks are not evenly distributed throughout Central Indiana. Instead, communities in northern Marion County and the city of Carmel tend to have higher concentrations of low-risk workers coinciding with generally higher household incomes. In contrast, areas with higher concentrations of high-risk workers tend to be spread around the outer regions of the metro, especially to the northeast in the city of Anderson and Madison County more broadly.

# Qualitative Input

To complement the quantitative analysis, TIP designed a robust stakeholder engagement plan, which included in-depth roundtables, strategy working groups, workshops, meetings, and interviews. The IMPO maintained a CEDS website with presentations and recordings from all committee meetings, background reports about the strategy and planning process, and information to provide feedback.

The cornerstone for the engagement plan was a series of roundtable discussions with area experts and regional leaders to gather input on challenges and opportunities for the CEDS. Roundtables were organized by topic, including sector-focused discussions (manufacturing, distribution, and logistics; life sciences; sports development; and tourism) as well as sessions centered on broad issues (talent attraction, attainable housing, infrastructure, and environmental concerns) and programmatic areas (workforce development, education, entrepreneurship, and economic development). These input sessions were supplemented with one-on-one interviews to solicit feedback on issues that did not surface in a collective setting.

Following the roundtables and interviews, TIP hosted 12 working group sessions designed to validate preliminary findings, discuss potential solutions and existing efforts, and provide feedback about draft strategies. These working group sessions addressed four overarching topics: equitable growth, technology and innovation, workforce, and infrastructure. Finally, Mentimeter, an interactive polling platform, was used throughout stakeholder engagement efforts to gather real-time feedback. Additional information about the qualitative input can be found in Appendix B.

Figure 9. Stakeholder Engagement



Source: TIP Strategies, Inc.

# SWOT Analysis

Using the findings from quantitative data and qualitative input from community leaders and area experts, TIP reviewed and compiled Central Indiana’s strengths, weaknesses, opportunities, and threats (SWOT). This analysis helped frame the CEDS goals and, ultimately, the strategies and action items.

Figure 10. SWOT Analysis

 <h2>Strengths</h2>	 <h2>Weaknesses</h2>
<p><i>Advantages that can be built on to grow a thriving local economy.</i></p>	<p><i>Liabilities and obstacles that limit economic growth potential.</i></p>
<ul style="list-style-type: none"> <li>• Arts and Culture</li> <li>• Technology Innovation Hubs</li> <li>• Sports and Sporting Venues</li> <li>• Quality of Life</li> <li>• Exceptional Healthcare Systems</li> <li>• Indianapolis International Airport (IND)</li> <li>• Diverse Industries</li> <li>• Recent Infrastructure Investments</li> </ul>	<ul style="list-style-type: none"> <li>• Long Commute Averages</li> <li>• Lack of Multifamily Housing</li> <li>• Educational Attainment Rates Vastly Different across the Region</li> <li>• Regional Public Transit</li> <li>• Broadband Service</li> <li>• Aging Population</li> <li>• Stagnant Growth in Parts of the Region</li> </ul>
 <h2>Opportunities</h2>	 <h2>Threats</h2>
<p><i>Assets and positive trends with significant potential for increased prosperity.</i></p>	<p><i>Vulnerabilities and unfavorable factors that could negatively affect the local economy.</i></p>
<ul style="list-style-type: none"> <li>• Inclusive and Equitable Growth Initiatives</li> <li>• Entrepreneurship</li> <li>• Workforce Development</li> <li>• Rapid Transit Lines</li> <li>• Urban Infill Development</li> <li>• Transit-Oriented Development</li> <li>• Small Business Development</li> <li>• Tech and Innovation Growth</li> <li>• Outdoor and Recreational Amenities</li> <li>• Rural and Suburban Development</li> <li>• Work-Based Learning and Apprenticeships</li> </ul>	<ul style="list-style-type: none"> <li>• Crime Rates</li> <li>• Low-Wage Jobs</li> <li>• Poverty</li> <li>• Racism and Racial Inequality</li> <li>• Long-Term Water Supply</li> <li>• Air and Water Quality, Environmental Concerns</li> <li>• Lack of Economic Development Tools</li> <li>• Exclusionary Zoning and Development Practices</li> </ul>

Source: TIP Strategies, Inc.

## 4. Strategic Plan

---



# Goal 1. Talent

*Develop, attract, and retain a strong, diverse talent pool by building on the collaboration among Central Indiana’s education and training organizations, workforce development programs, and private sector employers.*

Access to talent consistently remains a top concern in corporate investment decisions. This concern is especially pronounced as companies and workers alike recover from the economic effects of the COVID-19 pandemic. With that, workforce development, talent attraction, and talent retention are as important as ever to sustain and grow a thriving regional economy. When it comes to workforce development, it is vital for Central Indiana’s existing labor force to have access to the education and training programs needed to access good and promising jobs as well as to prepare students for the jobs of the future. Although these jobs may not exist today, investing in digital literacy initiatives ensures students are prepared for high technology occupations. Collaboration among regional employers, higher education institutions, workforce training programs, and adult training programs is critical to accomplish this objective. By bringing these partners together, the region can develop clear career pathways for residents. Under the guiding principle of equitable growth, the region has made the commitment to intentional investments in workforce and economic development. With vastly different educational attainment rates and workforce skills across Central Indiana, along with a growing diverse population, this commitment is warranted and can, in part, be accomplished by prioritizing career advancement opportunities and resources for underserved populations.

## 1.1. Strengthen the skilled talent pipeline by supporting investments starting from PreK-12 throughout adulthood with a focus on digital literacy in underserved populations and communities.

### 1.1.1. Continue to support and invest in PreK-12 education, especially around science, technology, engineering, arts, and math (STEAM).

- Target support and investments in rural and underserved communities.
- Prepare students for the high-growth jobs of the future, including occupations in green and high-tech industries.



### Case Study

#### The Imagination Lab

**Location:** Plainfield, Indiana

**More Information:**

[www.plainfield.k12.in.us/o/the-imagination-lab](http://www.plainfield.k12.in.us/o/the-imagination-lab)

In 2017, school district officials in Plainfield, Indiana, were given the opportunity to creatively repurpose a former indoor swimming pool at Clarks Creek Elementary School. Although local students performed well in standardized tests, administrators felt more could be done to actively engage students and prepare them for future careers. Leaders envisioned a hands-on space where students could explore, create, and learn through experience. The Imagination Lab (the Lab) officially opened in fall 2018, with a plan for every elementary school student to spend multiple days at the facility each school year. The Lab includes classrooms, collaborative space, and a studio. The studio is the largest of the three areas and is comprised of a messy space (for art and science projects), a technology space (with computers and equipment for coding and software development), a maker space, a fabrication lab, two green rooms, sound booths, and an amphitheater. The flexible space design allows students and educators to support multiple functions and configurations that can change based on need.

- 1.1.2. Increase career exposure and pathways to students beginning in grade school and scale existing programs to have a stronger regional impact.
- 1.1.3. Engage the private sector in curriculum development to ensure work-ready skills and programs are deployed.
- 1.1.4. Support digital literacy by improving access to broadband-ready devices across the region, especially in low-income communities (cross-referenced in strategy 2.5).
- 1.2. Develop clear career pathways for Central Indiana residents by working with regional employers and education/training organizations to ensure strong communication on talent needs.**
  - 1.2.1. Create industry sector councils and/or sector partnerships to outline specific workforce training requirements and demand.
    - Effectively communicate the workforce training needs of the private sector to education/training organizations to ensure that programs with the highest need remain accessible.
    - Leverage existing resources like industry associations that represent multiple employers and the Indiana Plan and Launch Sector Partnership Initiative framework.
  - 1.2.2. Assess and map the skills and specialties of workforce partners to increase regional collaboration across training areas and technical skills.
  - 1.2.3. Partner with vocational schools and community colleges to strengthen programs that build a skilled and resilient workforce like cross-training and upskilling employees, especially for workers in rural and underserved communities.
    - Convene vocational schools, community colleges, and industry employers to regularly share best practices in cross-training and upskilling initiatives.
  - 1.2.4. Prioritize implementation of employment initiatives and expand regionwide, focusing on strengthening regional employer engagement by establishing consistent feedback loops and direct worker engagement.
- 1.3. Implement and expand programs to help workers overcome employment barriers to access better career opportunities, especially in minoritized populations.**
  - 1.3.1. Uplift and scale existing, successful programs that provide direct engagement and mentoring with populations who have historically faced employment barriers to identify and provide solutions.
  - 1.3.2. Advocate for the expansion of reentry pathways to employment and reintegration of formerly incarcerated individuals.
  - 1.3.3. Explore subsidies to incentivize the colocation of on-the-job training programs with other wraparound services, such as childcare.
- 1.4. Raise awareness of the region's career opportunities through internships, apprenticeships, and career exploration events to retain talent in the Central Indiana region.**
  - 1.4.1. Grow the number of private and nonprofit employers offering paid internship and apprenticeship opportunities, including alternative and flexible learning opportunities that lead to career growth.
    - Use national best practices and the Work and Learn Indiana program to expand funding opportunities for paid internships.

- 1.4.2.** Strengthen programs that build a skilled and resilient workforce, such as cross-training and upskilling employees.
    - 1.4.3.** Map the skills and specialties of workforce partners to increase regional collaboration across training areas and technical skills.
  - 1.5. Expand the region's diverse workforce by attracting new talent in high-demand occupations to the region while supporting communities looking for growth.**
    - 1.5.1.** Based on industry sector councils and sector partnerships (cross-referenced in action 1.2.1), identify priority occupations for talent recruitment needs.
    - 1.5.2.** Create a talent recruitment toolkit and share it with regional employers to assist them in their efforts to recruit hard-to-fill, high-demand occupations and skills from the rest of Indiana and beyond.
    - 1.5.3.** Enlist regional young professional societies to play a larger role in talent retention initiatives and career networking events.
  - 1.6. Focus efforts on underserved and at-risk youth who are currently not in school or the workforce to connect them to good and promising jobs.**
    - 1.6.1.** Identify and coordinate with nontraditional economic development organizations, such as nonprofits and youth development programs, to identify young adults for skill development opportunities.
    - 1.6.2.** Seek additional funding streams to scale programs where there is greater need for service delivery.
    - 1.6.3.** Develop and expand mentorship programs that expose young adults to career opportunities and pathways, including entrepreneurship (cross-referenced in actions 2.2.2. and 2.4.2).

## Goal 2. Innovation

*Create a robust network of forward-thinking initiatives around business recruitment, entrepreneurial support, research and development, and technology adoption to fuel innovative growth.*

Entrepreneurship, innovation, and the adoption of new technologies are essential components to growing a vibrant regional economy. While the eight-county Central Indiana region has tremendous potential to leverage existing assets to drive innovation, much more can be done to shape the region's narrative of being a thriving innovation ecosystem. Marketing entrepreneurial support resources, networking events, competitions, and even success stories can go a long way. Additionally, a commitment to small businesses and startups through technical support and workforce development is needed to continue to foster innovation and the entrepreneurial spirit in the region, especially for underserved entrepreneurs. Small businesses and startups alike can benefit tremendously from digitization support and increased access to flexible capital. Meanwhile, the region is home to a strong set of legacy clusters whose specialties can be leveraged in support of productivity growth and cross-sector synergies. A better network of connectivity via broadband infrastructure can provide stronger support to fuel innovative growth as well.

### 2.1. Support the work of chambers, local economic development organizations, and the Central Indiana Corporate Partnership (CICP) to strengthen existing businesses and bolster business recruitment efforts.

- 2.1.1. Continue partnerships with the region's major employers to attract research-and-development funding to the region, especially within the region's target sectors.
- 2.1.2. Identify barriers and opportunities for business expansion and recruitment projects, including transportation and infrastructure needs (see strategy 3.4).



### Case Study

#### Reverse Pitch Competition

**Location:** Portland, Oregon

**More Information:**

<https://pamplinmedia.com/but/239-news/386521-275542-the-greater-portland-tech-challenge>.

In response to the Portland, Oregon, Smart City goals, Greater Portland Inc (GPI) developed a two-part reverse pitch competition and networking event to connect the region's public sector and the tech community to collaboratively address community challenges. For the first part, each agency/city/organization presented at least one challenge to an audience of problem-solving technology firms and then each technology firm pitched its problem-solving capacity to the audience of agencies. Following the pitches, teams from both sides ranked the presentations and matches were made by GPI. In the second part, agencies and tech companies that matched highest met one-on-one to answer questions, tackle additional problem solving, and plan potential next steps. Although this program is specifically aimed at connecting the public sector and the private sector, similar events could be held to connect startups to existing businesses or entrepreneurs to mentors.

- 2.1.3.** Encourage cross-sector industry collaboration to bolster industry synergies that drive productivity.
  - Deepen engagement with convention and conference attendees to encourage collaboration with local businesses to foster innovation (see Esports Sector Development Case Study).
- 2.1.4.** Convene local partners to craft an updated narrative of the region’s legacy industry clusters and innovative culture to support business recruitment efforts.



## Case Study

### Esports Sector Development

**Location:** Atlanta, Georgia

**More Information:** [Georgia Department of Economic Development Esports Industry](#), [Cxmmunity](#), and [Atlanta Esports Alliance](#)

Over the past five years, the state of Georgia has invested heavily in the esports industry, from supporting the growth and development of workforce education to attracting cutting-edge gaming companies. In partnership with economic development, higher education, and the private sector, this support has translated to over 12,000 direct and indirect gaming jobs and a \$550 million annual impact on the state’s economy. Higher education facilities across the state, including historically Black colleges and universities, have developed programs to cater to the thriving gaming development industry and esports facilities. Georgia is also home to Cxmmunity, an Atlanta-based organization dedicated to increasing the participation of minorities in esports and the video game industry. Through their work, Cxmmunity was able to secure 15 student internships for Black, Indigenous, and people of color in high-profile esports companies in the spring of 2021. In 2019, the Atlanta Sports Council (ASC), a division of the Metro Atlanta Chamber (MAC), launched the Atlanta Esports Alliance to position the city as the US esports capital. The Atlanta Esports Alliance is a collaborative effort of ASC, MAC, Georgia Game Developers Association, Skillshot Media, and state and local economic development officials dedicated to growing the esports industry. Efforts are focused on growing the esports workforce, attracting and growing gaming companies, and hosting esports events and conferences.

## 2.2. Develop inclusive tech ecosystems through comprehensive entrepreneurial support systems.

- 2.2.1.** Share a regional entrepreneurship ecosystem map indicating assets across the region that drive new business activity. Highlight initiatives that market resources for traditionally underserved communities.
- 2.2.2.** Facilitate structured entrepreneurial-minded mentorship and networking opportunities from as early as PreK-12 throughout adulthood (cross-referenced in actions 1.6.3 and 2.4.2).
- 2.2.3.** Expand marketing efforts on entrepreneurial events in coordination with the local media, including reverse pitch competitions.
- 2.2.4.** Work collaboratively with regional and local community development financial institutions (CDFIs), angel investors, and venture capitalists to improve access to seed capital, especially in rural and underserved communities and minoritized populations.



- Support the Indianapolis Small Business CDFI Collaborative with attraction and development of assets available for lending.

**2.2.5.** Increase diversity within target clusters by uplifting and scaling equity programs across the region.

**2.3. Assist small businesses with tech adoption, modernization processes, and innovation that drive efficiencies.**

**2.3.1.** Prioritize workforce training and upskilling opportunities for the region's existing workforce to utilize new technology and cross-train employees.

**2.3.2.** Increase joint business visits between economic development and industry partners.

**2.3.3.** Assist small businesses and startups with real estate acquisition; loans for furniture, equipment, and inventory; working capital; legal counsel; insurance; and marketing efforts.

**2.4. Increase collaboration between higher education and the private sector to spur startups and research commercialization (tech transfer).**

**2.4.1.** Explore reverse pitch competitions to expose new technology to legacy businesses and industries.

**2.4.2.** Expand mentorship programs between entrepreneurial leaders and students (cross-referenced in actions 1.6.3 and 2.2.2).

**2.5. Expand broadband infrastructure in both urban and rural communities throughout the region (cross-referenced in action 1.1.4).**

**2.5.1.** Coordinate a comprehensive study of broadband infrastructure gaps, leveraging and building on existing work, and identifying the most applicable solutions in each county/jurisdiction.

**2.5.2.** Connect communities and individuals with the state of Indiana Next Level Connections Broadband Grant Program for broadband access.

## Goal 3. Place

*Establish an attractive and welcoming environment for residents and tourists through a holistic approach to quality-of-place initiatives that draws on cross-sector partnerships.*

A strong quality of life is crucial to support all aspects of economic development. It helps to create a competitive local talent pool, to advance infrastructure investments in support of growth, and to strengthen local businesses. With that, a major component of improving Central Indiana's quality of place revolves around access. Increased mobility across and within the eight-county region is critical for residents to access employment opportunities and amenities. Hardening infrastructure will ensure that those living in Central Indiana have access to reliable electric and natural gas capacity, water and wastewater infrastructure, and telecommunications/broadband infrastructure. Meanwhile, businesses seek out vibrant communities to access talent more easily through attraction and retention efforts. While the Central Indiana region offers residents a variety of sports venues and a vibrant arts and culture scene, more can be done to invest in quality and placemaking amenities that will, in turn, become investments in Central Indiana's workforce and businesses.



### Case Study

#### Wi-Fi and Broadband Equity

**Location:** Kansas City, Missouri

**More Information:** [Kansas City Coalition for Digital Inclusion](#), [KC Digital Drive](#)

Kansas City, Missouri, is a leader in telecommunications access. Google Fiber paved the way in 2011 when the community was selected to be the first city in the US to receive the company's ultra-high speed internet service. In 2015, the Kansas City Coalition for Digital Inclusion was created to help alleviate barriers to broadband access. The organization continues to advance projects and initiatives to increase access to devices and service. Kansas City was also one of the first cities in the US to launch a Smart City plan in 2016. By the end of that year, in partnership with Sprint and Cisco, 54 blocks of downtown had free public Wi-Fi along the KC Streetcar line. The wireless network system has bolstered streetcar ridership, prepared the city for the adoption of autonomous vehicles, and made the area more user friendly for residents and visitors. The city continues to explore ways to extend the free Wi-Fi service to traditionally underserved neighborhoods on Kansas City's east side. In addition to the Kansas City Coalition for Digital Inclusion, KC Digital Drive continues to lead broadband expansion projects across the region.

### 3.1. Create vibrant and inclusive communities that support businesses and promote amenities for residents and visitors.

- 3.1.1. Identify park, parklet, and green space development opportunities to increase the percentage of residents in the region that live within a 10-minute walk to a public space.
- 3.1.2. Explore options to bring free wireless network zones to parks and activity centers throughout the region.
- 3.1.3. Encourage development of complementary businesses and land uses near regional recreational amenities.

- 3.1.4.** Adopt complete streets practices that improve safety, comfort, and access for pedestrians, cyclists, and motorists, especially in underserved communities.
  - Utilize the IMPO Vision Zero<sup>4</sup> toolkit to improve road safety and support communities' efforts to adopt a vision zero policy.

**3.2. Target greyfield and brownfield remediation and redevelopment to maximize the impact of existing funding opportunities while prioritizing historically under-resourced communities.**

- 3.2.1.** Develop communications and educational materials about redevelopment opportunities and funding/financing opportunities to share with regional developers.
- 3.2.2.** Develop a list of best practices and remediation guidelines in coordination with regional partners.
  - Host a panel to share findings.
- 3.2.3.** Advance mechanisms for land banking and land assembly initiatives, especially to aggregate land parcels for larger scale development opportunities, such as industrial or mixed use.
  - Identify and map environmentally sensitive areas (see action 3.6.2).

**3.3. Expand and preserve a full range of housing options (owner and rental), including attainable workforce housing and transit-oriented development (TOD).**

- 3.3.1.** Leverage the American Rescue Plan Act and other near-term funding sources to invest in attainable housing and diversify the housing stock.
  - Share lessons learned and initiatives across the region regarding local plans to increase housing, including multifamily categories.
  - Preserve and maintain existing affordable housing by increasing access to home improvement grants and weatherization programs.
- 3.3.2.** Implement area plans for the IMPO's Regional Activity Centers to concentrate future housing growth in appropriate areas.
  - Ensure new housing developments have adequate connectivity to job centers through shared mobility systems and nonmotorized routes.
- 3.3.3.** Explore zoning policy changes to reduce barriers to housing development.
- 3.3.4.** Identify municipal/county-controlled land in urban areas for residential housing units as well as in-fill opportunities, especially in downtown Indianapolis.
- 3.3.5.** Advance community land trusts as a mechanism for long-term housing affordability.<sup>5</sup>

**3.4. Enhance transportation options, including nonmotorized routes and shared mobility services, for residents to access better employment opportunities across the entire region (see action 2.1.2).**

- 3.4.1.** Expand public-private partnerships for joined-up private transit and connector services to help bring workers to jobs.

---

<sup>4</sup> Vision Zero Network. <https://visionzeronetwork.org>.

<sup>5</sup> *First Suburbs Coalition Regional Housing Summit*. TIP Strategies, Inc.; National League of Cities; and Mid-America Regional Council. November 2019.



- 3.4.2. Successfully implement regional transit and route improvement projects as well as build momentum to expand public mass transportation beyond county lines.
  - Continue to support regional bus rapid transit (BRT) expansion with the IndyGo Blue and Purple Lines.
  - Identify opportunities to secure funding to complete the proposed bikeways in the 2020 *Regional Bikeways Plan* as well as projects that improve rider safety, especially in high traffic areas.
- 3.4.3. Build on the success of the regional trail systems and implement planned trail networks.
- 3.4.4. Support adoption of no/low emission vehicles for transit vehicles, increased access to bike share and bike facilities, and increased access to electric vehicle charging.
- 3.5. **Coordinate regional support for water supply and demand management, including wellfield protection, existing water sources, and future expansion needs, and work toward collective impact in moving the White River Vision Plan forward.**
  - 3.5.1. Identify funding streams and secure grants to implement critical work related to river restoration and to expand recreational opportunities.
  - 3.5.2. Expand the 2019 *White River Plan* framework to the entire region, applying it to other watersheds where applicable, ensuring inclusion of all current and future water sources including wells, surface water, aquifers, and other systems.
  - 3.5.3. Build on the Indiana Water Summit to expand regional coordination of water management efforts, working toward the creation of water agreements.
- 3.6. **Modernize regional infrastructure systems to withstand disruption, improve efficiency, and enhance connectivity to ensure the region remains resilient and competitive.**
  - 3.6.1. Launch a feasibility study for hardening infrastructure systems most vulnerable to changes in climate and weather patterns, such as droughts, severe storms, and flooding.
  - 3.6.2. Develop a map of environmentally sensitive areas throughout the region that is available to view online (see action 3.2.3).
    - Encourage innovative mitigation solutions if a proposed project is expected to have adverse environmental impacts.
  - 3.6.3. Invest in the installation and maintenance of stormwater mitigation systems across the region, which may include rain gardens, bioswales, wetlands, permeable surfaces, and green spaces to improve resiliency.
    - Partner with the Indiana University Environmental Resilience Institute and workforce development organizations on recruitment and training of individuals to maintain stormwater mitigation systems. Work with the Urban Land Institute, Indiana Housing & Community Development Authority, Affordable Housing Association of Indiana, and similarly situated stakeholders in the real estate industry to encourage housing development practices that reduce water consumption, stormwater runoff, and irrigation, while promoting water conservation education and efforts.
  - 3.6.4. Support and adopt the use of sustainable and renewable energy generation.
    - Increase awareness of green energy options available to the private sector, especially in high energy use industries.
    - Develop goals to increase the use of renewable energy generation by municipalities.
    - Deploy strategies, in alignment with existing plans, to increase the number of solar energy installations throughout the region.

# Appendix A. Evaluation Framework

---

# Evaluation Framework

Metrics to track plan implementation are a vital component of the CEDS. An evaluation framework should include both broad indicators of community health as well as unique metrics that correlate back to the CEDS goals.

The community indicator metrics, or baseline CEDS performance metrics, include publicly available data sources at the national level, which allow for longitudinal tracking and comparison to peer and aspirational communities. These metrics, described in Figure 11, serve as a baseline to evaluate the region's competitive position. Where possible, all indicators should be disaggregated by gender and race/ethnicity.

To supplement these broad measures, additional metrics should be identified and added throughout the plan's implementation. Examples of these metrics are provided in Figure 12, however, they should be expanded as strategies and actions are deployed. Furthermore, just as the CEDS is designed to be a dynamic and evergreen plan, evaluation metrics are also adaptable to changing conditions. Due to the five-year planning horizon of the CEDS, not every metric needs to be tracked at project onset. Furthermore, some measures may require additional resources to track, extending the timeline for their implementation.

This evaluation framework allows for transparent communication on progress toward plan implementation and provides a mechanism for determining if the strategies are meeting the defined objectives of the CEDS.

**Figure 11. Baseline CEDS Performance Metrics**

Indicators of general community health and progress

TOPIC	EXAMPLES
<b>Demographics</b>	Population trends, age structure, gender, ethnic and racial diversity
<b>Socioeconomics</b>	Per capita income, median household income, poverty rate, educational attainment
<b>Housing</b>	Home values, mortgage/rent burden, mortgage equity, homeownership by race, new housing construction
<b>Workforce</b>	Civilian labor force, unemployment rate, median wage, commuting patterns
<b>Industry</b>	Job growth (all industries), target industries (location quotient, firm growth, employment), new business establishments
<b>Other</b>	Air travel trends, lodging data/visitor spending, air/water quality

**Figure 12. Strategic Action Metrics**

Indicators of progress on CEDS implementation

GOAL	DESCRIPTION
<b>Goal 1: Talent</b>	<ol style="list-style-type: none"> <li>1. Report job growth within target industries and the percentage of hires from minoritized populations.</li> <li>2. Track the number of workers moving to the eight-county Central Indiana region.</li> </ol>
<b>Goal 2: Innovation</b>	<ol style="list-style-type: none"> <li>1. Track the number of companies in the region that work with higher education institutions for tech use or development.</li> <li>2. Follow the number and dollar value of CDFI, seed, angel, and venture capital investments in Central Indiana companies.</li> </ol>
<b>Goal 3: Place</b>	<ol style="list-style-type: none"> <li>1. Track the number of new projects advanced and completed (brownfield/greyfield site readiness, transit and route improvements, etc.).</li> <li>2. Report broadband expansion efforts.</li> </ol>

Source: (both figures) TIP Strategies, Inc.

# Appendix B. Stakeholder Engagement

---

# Stakeholder Engagement

The CEDS Steering Committee was committed to inclusive and thoughtful stakeholder engagement throughout the duration of the planning process. Over 100 individuals, representing dozens of organizations, participated in topic-specific roundtables, working groups, community and stakeholder meetings, and interviews to provide insights about the strengths, weaknesses, opportunities, and threats facing the region (see Figure 10). In addition to targeted meetings and interviews with community leaders, a series of topic specific roundtables were held with more than 75 individuals representing public, private, and philanthropic sectors across all eight counties in Central Indiana. A partial list of roundtables participants is provided in this section.<sup>6</sup>

Following the roundtables, working groups were formed around four topics that emerged as key concerns for the CEDS: equitable growth, infrastructure, technology and innovation, and workforce. The working groups were comprised of subject area matter experts from across the region. Within each focus area, recovery and resiliency strategies were also discussed as well as how to integrate and align existing economic development efforts with the CEDS. Each group met three times over the course of three months to examine the challenges and opportunities within each area and develop strategies that were incorporated into the strategic action plan.

## Roundtable Participants

### *Chambers of Commerce/Local Economic Development Organizations*

- Brian Bilger
- Mike Dellinger
- Mark Fisher
- Allyson Gutwein
- Christian Maslowski
- Diane Schultz
- Randy Sorrell
- Rob Sparks
- Mike Thibideau
- Molly Whitehead

### *Convention and Visitors Bureaus/Destination Organizations*

- Matt Carter
- Brenda Myers
- Tina Rodgers
- Sherry Seiwert

### *Entrepreneurship*

- Jarvis Jointer
- Steffanie Peabody
- Ron Taylor

### *Environment*

- Julie Crewe
- Taylor Firestine
- Tedd Grain
- Lindsay Haake
- Jill Hoffman
- Piers Kirby
- Elizabeth Kryder-Reid
- Erik Mroz
- Jeff Willman

---

<sup>6</sup> These lists may not reflect all individuals who participated. Attendees were asked to opt in to be included here.

### ***Infrastructure***

- Jerry Bridges
- Brian Gildea
- Anna Gremling
- Lance Lantz
- Lucas Mastin
- Matt McBride
- Scott Rudd
- Erin Schneider
- John Seber

### ***Life Sciences***

- Keith Lauter
- Michael O'Connor
- Georgiana Reynal

### ***Manufacturing/Distribution/Logistics***

- Brian Bilger
- Kristin Brier
- Bryce Carpenter
- Andrew Klinger
- Lawrence McCormack
- Nathan Messer
- Nick Parr
- Mario Rodriguez
- Amanda Rubadue
- Randy Sorrell
- Brooke Thomas
- Molly Whitehead

### ***PreK-12 Education***

- Scott Bess
- Erin Brown
- Johanna Kitchell
- Cody Metcalf
- Flora Reichenadter
- Dr. Shawn Smith

### ***Sports Development***

- Matt Carter
- Mayor Andy Cook
- Steve Downing
- Jeff Eder
- William Knox
- Andy Mallon
- Todd Oliver
- Ryan Vaughn

### ***Talent Attraction***

- Emily Krueger
- Hannah Northup
- Joe Pellman
- Aaron Renn
- Nathan Ringham
- Mike Thibideau
- Mark Wasky

### ***Talent Development***

- Hannah Bast
- Teresa A. Bennett
- Emil Ekiyor
- Sherry Peak
- Briana Price
- Derek Price
- Patty Prosser
- Dave Tucker

### ***Workforce Housing***

- Melissa Benton
- Brad Coffing
- Andrea Davis
- Joe Hanson
- Aimee Jacobsen
- Jessica Love
- Jennifer Milliken
- Kelli Mirgeaux
- Chris Pryor
- Jim Rawlinson
- James Taylor

## **Working Group Participants**

### ***Equitable Growth***

- Matt Carter
- Lawrence McCormack
- Josh Messmer
- Mandala Moyo
- Nathan Ringham
- Victoria Ross-Frost
- Julia Saltsgaver
- Megan Savage
- Aryn Schounce
- James Taylor

### ***Infrastructure***

- Matt Carter
- Aaron Dixon
- Mark Fisher
- Anna Gremling
- David Holt
- Emily Krueger
- Josh Messmer
- Julia Saltsgaver
- Aryn Schounce

### ***Technology and Innovation***

- Aaron Dixon
- Mark Fisher
- Mitch Frazier
- Mitch Landess
- Nathan Ringham
- Julia Saltsgaver

### ***Workforce Development***

- Hannah Bast
- Teresa A. Bennett
- Matt Carter
- Joe Hanson
- Lawrence McCormack
- Lance D. Ratliff
- Victoria Ross-Frost
- Julia Saltsgaver
- Aryn Schounce
- Lora Steele
- Mike Thibideau