The Digital Economy will impact the River Valley region the same way a shift from an agriculture economy in the 19th century impacted much of the state. This document outlines the observed current conditions in the workforce, infrastructure and capital availability for the Digital Economy in the region and makes recommendations on actions that will work to improve current conditions and prepare for extended economic vitality in a changing digital world.
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Executive Summary
Introduction to Digital Economy Planning

What is the Digital Economy?
The Digital Economy consists of business conducted through computers and computer networks. Farmers use wireless moisture sensors on farms to increase yield and use the Internet to advertise and sell their crops. Doctors see patients using telemedicine, detectives use social media to investigate crime and lawyers find legal precedents through online searches rather than through paralegals and clerks. It is difficult to find a business or institution in Georgia that does not rely on the Internet and digital technology to improve service, lower cost, automate work, or expand into new markets.

The Digital Economy is not a replacement of our economy but an evolution of using technology to adapt business to global innovation. The Digital Economy is enabled by access to information technology infrastructure, skilled workforce and funding to incorporate these technologies and services into business operations. Computers, mobile phones, tablets, sensors, software applications and broadband networks are basic ingredients. Education, a skilled workforce, adult learning, and the financial resources to incorporate new technologies are critical enablers.

As business adoption of the Internet reaches critical mass, competition will intensify for companies and workers alike. It can produce benefits that include wider access to resources, more effective health-care and education systems, and a workforce with greater skills. Georgia’s ability to incorporate and use them directly affects its competitiveness.

Why is a Digital Economy Strategy Important to Georgia?
Georgia’s economy will increasingly be impacted by the Digital Economy, therefore, a long-term strategy and planning is critical in providing stability and opportunity for future generations.

The Digital Economy is creating new industry and new business opportunities such as one Georgia start-up company, AirWatch that sold in 2014 for more than $1.5 billion. New technologies have lowered the costs and opened access to markets anywhere in the world by anyone in Georgia who has access to the technology, knowledge, skills and the drive to pursue them.

The Digital Economy disrupts businesses and institutions that took decades to build. Jobs are being lost to offshoring of manufacturing enabled by the technologies and networks of the Digital Economy. Many video and record stores, bookstores, and even shopping malls were other early victims. This trend will accelerate. One study conducted by Oxford Professors indicates 47 percent of current professions could be at risk for automation by 2025. The Pew Research Center’s Internet Project has been analyzing the impact of the Internet for over a decade. Its most recent study in August 2014 analyzed how daily life will be changed by 2025 through the Internet, artificial intelligence and robotics after speaking with almost 2,000 widely quoted technologists and analysts.

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The conclusions directly quoted below emphasize how large a role the Digital Economy will play in the future:

**Key themes: Reasons to be Concerned**

1) Impacts from automation have thus far impacted mostly blue-collar employment; the coming wave of innovation threatens to upend white-collar work as well.

2) Certain highly-skilled workers will succeed wildly in this new environment—but far more may be displaced into lower paying service industry jobs at best, or permanent unemployment at worst.

3) Our educational system is not adequately preparing us for work of the future, and our political and economic institutions are poorly equipped to handle these hard choices.

**Key themes: Reasons to be Hopeful**

1) Advances in technology may displace certain types of work, but historically they have been a net creator of jobs.

2) We will adapt to these changes by inventing entirely new types of work and by taking advantage of uniquely human capabilities.

3) Technology will free us from day-to-day drudgery and allow us to define our relationship with “work” in a more positive and socially beneficial way.

4) Ultimately, we as a society control our own destiny through the choices we make.

**What does the Regional Digital Economy Plan accomplish?**

The Regional Digital Economy Plan examines local and regional abilities to participate in the Digital Economy and identifies important resources, organizations, leaders, programs and investments that already exist, that can be leveraged in the future. The plan also identifies the region’s gaps in infrastructure, workforce, and access to capital and aligns, prioritizes and converts these gaps into actionable projects with goals that can be measured.

The planning process analyzes the Digital Economy capacity of each region in at least three distinct areas:

1. Workforce capabilities and needs

2. Supporting infrastructure and services for Internet connectivity

3. Access to capital to invest in the region’s plan to increase participation in the Digital Economy

The most important value of these plans is to raise awareness, develop community and regional collaboration, prioritize objectives and establish plans to use our assets and strengths to be competitive.

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The key to success for any region in the future will be cooperatively working together to leverage opportunities and mitigate threats brought about by the ever-growing Digital Economy.

**Regional Summary**

The River Valley Regional Commission looks at a 16-county area of southwest Georgia with a very diverse economic base. The Urban Core of the region is Columbus – the second largest municipality in the state. Elsewhere in the region are some of the least densely populated areas east of the Mississippi River. Agricultural uses and traditional agricultural towns are located throughout this rural area. The River Valley Regional Commission assists the entire region with planning and economic development work to help maintain the population levels and provide governmental assistance where necessary.

**Description and explanation of Regional Division**

The communities in the River Valley region behave very differently based on their size, location, and industry. For the purposes of this Digital Economy Plan, the River Valley region was divided into three geographic areas that have different needs and opportunities. These three areas are Urban Core, Rural Center, and Rural. The division into three areas addresses the different economic conditions throughout the River Valley region. For instance, the needs for workforce development in Columbus clearly differ from the needs in Americus, which also differ from the needs in Buena Vista. This division therefore allows us to discuss in detail the proposed work plans for communities with similar needs and opportunities.

**Urban Core**

The Urban Core for the River Valley region is Columbus. The Urban Core is largely wired, with multiple service providers in competition for customers. There are 202,000 potential customers, four publicly traded companies, and a workforce of 84,000

**Rural Center**

The Rural Center of the River Valley region refers to two communities that provide commerce, educational and medical services for a wide geographic area. Americus and Cordele both have four-year colleges, access to two-year technical colleges, sophisticated medical services and robust commercial and retail opportunities. The Rural Centers are also well served with data capacity, with fiber availability and data speeds that rival anyone currently living anywhere in the southeast.

**Rural**

The Rural areas of the River Valley region are small towns and unincorporated areas of the counties. This includes Andersonville, Arabi, Bluffton, Buena Vista, Butler, Byromville, Cuthbert, DeSoto, Dooling, Ellaville, Fort Gaines, Geneva, Hamilton, Ideal, Junction City, Leslie, Lilly, Lumpkin, Marshallville, Montezuma, Oglethorpe, Pine Mountain, Pinehurst, Plains, Reynolds, Richland, Shellman, Shiloh, Talbotton, Unadilla, Vienna, Waverly Hall, Woodland; the unified or consolidated counties of

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3Civilian Labor Force in Muscogee County, GA: http://research.stlouisfed.org/fred2/series/GAMUSC0LFN
Chattahoochee, Quitman and Webster counties; and the unincorporated areas of Clay, Crisp, Dooly, Harris, Macon, Marion, Randolph, Schley, Stewart, Sumter, Talbot, and Taylor counties.

Rural areas have a number of small manufacturing facilities, but their primary economic role has been agriculture-based industries and smaller local community services. Sometimes, tourism opportunities present themselves in these rural areas. Most rural areas in the River Valley region are less than 5,000 people, with a few that are just more than 100 people.
Map of Region

Period of work to develop plan
The RVRC kicked off the Digital Economy Plan in January 2014. Stakeholders were identified and meetings were held throughout the region to gather input and to help identify the strengths, weaknesses, opportunities and challenges in the changing digital economy for the region. Further input was gathered to suggest appropriate strategic focus areas to work on over the next few years. A survey was developed and deployed in May 2014 to help understand current needs of residents. Survey results were shared in August 2014. Drafts of the plan were shared in September 2014 and October 2014. The plan will be fully adopted by the River Valley Regional Commission in January 2015.

Regional Stakeholders
The highest levels of stakeholder engagement during the process were from chamber executives, service providers, and the Technology Association of Georgia chapter in Columbus. Early meetings were
conducted with the service providers as a courtesy and to gather basic information about what their needs were to improve their networks. To reach beyond these groups, informational presentations were given to local Rotary clubs, Chambers of Commerce meetings, the Valley Partnership for Economic Development, and the RVRC council meetings. All participants in the survey were also engaged throughout the planning process. A full list of stakeholders and meetings is included in Appendix A.

Regional Overview

Economic Summary of the River Valley region

The River Valley region has an economic base supported by Fort Benning (the largest employer in the region with 42,000 employees). The business base of Columbus provides 130,930 jobs in the MSA, with the largest private employers there being TSYS and AFLAC.

Throughout the rest of the River Valley region, agriculture, including fiber production, silviculture and row crop agriculture are predominant. Service types jobs account for 65% of the industrial mix, 15% are goods producing and 20% government.

The unemployment rate for the region in 2013 was 9.1%, a decrease from 2012 (9.9%).

<table>
<thead>
<tr>
<th></th>
<th>RVRC</th>
<th>Urban Core</th>
<th>Rural Center</th>
<th>Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor Force</td>
<td>231,515</td>
<td>84,909</td>
<td>22,293</td>
<td>124,313</td>
</tr>
<tr>
<td>Employed</td>
<td>210,439</td>
<td>77,358</td>
<td>19,624</td>
<td>113,457</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>9.1%</td>
<td>8.9%</td>
<td>11.9%</td>
<td>8.7%</td>
</tr>
</tbody>
</table>

Source: Georgia Department of Labor

The updated Comprehensive Economic Development Strategy (CEDS) for the River Valley region was developed in 2012 using survey data from throughout the region. Surveys indicated that respondents saw the economic strengths and potential in the region in tourism development and tourism assets such as Plains, the home of President Jimmy Carter, which attracts thousands of people to the region, as well as Callaway Gardens in Pine Mountain, and the authentic historical assets and downtown communities throughout the area. Weaknesses identified included the lack of a well-trained workforce and concerns about the quality of local/regional school systems. Not surprisingly, this leads to concerns about the flight of younger generations from communities and resulting vacancies in main streets and town centers.

A major push for the CEDS committee and for economic development professionals in the region continues to be the improvement of our education systems. Improving high school graduation rates and creating a dual enrollment program between high schools and the local community colleges have been strategies to help the struggling, as well as the high-achieving students in the region. School districts themselves have been instrumental in preparing students for the Digital Economy. Robotics teams (see

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4 Source: http://www.columbusgachamber.com/major-employers
sidebar), digital work plans and digital classrooms have all become instrumental in the teaching and use of technology.\textsuperscript{5,6}

\textsuperscript{5} https://www.facebook.com/ColumbusCorps

\textsuperscript{6} The Muscogee County School District has also developed an extensive technology plan to address classroom needs and how the district will interact with parents. For more, see https://www.muscogee.k12.ga.us/AboutUS/Pages/Spotlight.aspx
Population density in the rural counties show how few people live in some areas of the River Valley region. This creates problems in developing the network necessary to serve the people in the region because there is not the customer base to warrant the necessary investment.

**Economic Summary – Report on Survey**

To help gather information of the utilization of digital resources in the River Valley region, the RVRC conducted an online survey throughout the region to gather information about people’s comfort, access and use of computer and online tools.

To best reach residents in the River Valley region, and to respect the time and effort needed to take surveys, two surveys were used that ran simultaneously. A preliminary six-question survey was designed to ask basic questions and be taken quickly by a wide range of people. There was a link from this survey to a longer, 12-question general survey that asked more in-depth questions about usage, provided a speed test tool, and asked open-ended questions requiring direct feedback. The surveys were approached in this way to ascertain as much information as possible from a wide geographic and user-base.

Findings from the survey indicate a need for training on a wide range of computer skills. People asked for help on basic computer skills to more robust server, networking and data security training. The surveys also indicated that no one doubted the importance of the Internet and the Digital Economy.

The full report and findings can be found in the appendix.

**Economic Summary of Region**

**Urban Core**

Columbus has long been known as a manufacturing and mill town, with significant employment throughout the city from the turn of the 20th century through the 1990s. The current base as a regional banking center (Synovus) comes from an early, and locally well-documented incident where a factory worker, protecting her life savings in her blouse, was nearly killed in an accident using the mechanical loom she was working on. That new technology and the new economy of the manufacturing base necessitated new ways of thinking. Columbus Bank and Trust was initially established to support mill workers and give them safe and secure places to store their valuables and earnings. The bank evolved, started and purchased more banks, and became Synovus, one of the four publicly-traded companies headquartered in Columbus.

Further disruptive influences to the economy, based on early computing power, caused changes to the economy in the 1950s and led to an early project of Synovus to process credit cards electronically. TSYS began processing credit cards for other banks in the 1970s, and in 1983 became a seperately publicly traded company.

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In just 30 years, TSYS has developed into a global credit card processor of choice with more than $1.6 billion in total equity ($3.6 billion in total assets). TSYS is also one of the two publicly traded companies in Columbus on the S&P 500 (and one of only 15 in the state of Georgia). Incidentally, with two companies, Columbus has the same number of S&P 500 companies headquartered in the city as Birmingham, AL and Raleigh, NC.

Another example of historic innovation and adoption to new market forces in Columbus is AFLAC. Founded by Dan Amos and his brothers in 1955, AFLAC is now a part of the S&P 500 and shows that innovation and good ideas can develop into one of the best-known brands in the world. The history of this small start-up being operated with minimal resources illustrates how shifts in market demand create opportunities that propel a small local company to become a national powerhouse business and major local employer.8

One interesting component to note about AFLAC is the importance of design and brand awareness. Starting with the 1990s AFLAC duck, the company has become one of the world’s most widely recognized companies. Design does matter in the digital economy, and the more Columbus and the River Valley region can do to promote good design, the better we will be at keeping up with national trends and ahead of the business curve.

Rural Center
The Rural Centers of the River Valley as identified earlier behave differently than the Urban Core of Columbus and than rural towns and unincorporated areas of the region. There are not the major employers as in Columbus, but the Rural Centers serve as a base of employment services and retail goods for a wide geographic area. In the River Valley region, the Rural Centers are Cordele and Americus.9 One aspect that identifies Rural Centers is whether people from other rural areas travel there as a center of their shopping and services. A scan of the Walmart parking lot in Americus will show

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9 In the regional Comprehensive Economic Development Strategy (CEDS), Harris County is identified as a Regional Center. Although good arguments can be made for including it here, Harris County residents are often commuting elsewhere for their services and retail. It is developing a strong employment base with KIA suppliers, employees and a large Koch chicken plant that employs more than 700 people. It is a rural base that serves both Columbus and Atlanta with employees and tourism opportunities.
county plates from several surrounding counties. Furthermore, hard data support that many people commute into Americus and Cordele for work\textsuperscript{10}.

This has been a traditional role for a place like Americus, which has long been served by the Windsor Hotel and known as the “Metropolis of Southwest Georgia”\textsuperscript{11}. Americus has, since its founding, served as a distribution center for cotton and continues to aggregate shipments of cotton throughout the region.

Cordele, with its position as a rail crossroad and its location on Interstate 75, has grown into its role as a Rural Center. It now calls itself the “Gateway to South Georgia”\textsuperscript{12} and is capitalizing on its rail position and proximity to transit to support the Cordele Intermodal Rail. It too serves a wide geographic area with its retail, lodging and other services, including a regional Walmart.

Major employers in the Rural Centers are local universities and hospitals.

\textit{Rural}

The Rural areas of the River Valley region were historically used for row crops and turpentine (naval stores) or timber operations since the region opened up and was settled after the native Creek population was removed in the 1830s. The economic roles of the Rural areas (with the notable exception of turpentining and naval store industry) have largely remained unchanged in terms of natural resources production, but have added new economic sectors such as prisons (Stewart, Macon, and Crisp counties all have significant prison populations), small manufacturing, and food production, particularly chicken processing plants.

The rural areas of the River Valley region can really be subdivided further. Harris County, which serves as both a tourist destination (Pine Mountain, Callaway Gardens) and bedroom community for Columbus has very different strengths, opportunities, and economic base than a row crop agricultural town like Preston.

The primary agricultural commodity in the River Valley region is timber production and traditional southern row crops such as corn, soybeans, peanuts and cotton. There are several notable areas of specialty crops such as strawberries, blueberries, olives, pecans and watermelons. Chicken producers and processors are also a significant source of revenue and employment.

Although agriculture is the historic and current base of economic activity for most of our rural communities, service and manufacturing businesses are increasing throughout the region as companies often find the regulations, support, and business climate to be frendlier in rural areas.

For instance, Richland Rum is a top-shelf liquor produced in downtown Richland and sold internationally. The company located there to produce its distilled rum product because the local

\textsuperscript{10} Georgia Department of Labor statistics. Americus (Sumter County) has a net of 916 people coming into the county for work every day. Cordele (Crisp County) has a net of 940 people coming to work daily.

\textsuperscript{11} Source: http://en.wikipedia.org/wiki/Americus,_Georgia

\textsuperscript{12} Source: http://en.wikipedia.org/wiki/Cordele,_Georgia
support and ease of operations and licensing were more favorable than in any urban or suburban community. In a place like Columbus or Atlanta, the distillery may have had to locate in an industrial area, but in Richland they can occupy and rehabilitate three downtown buildings for a fraction of the start-up costs.

Tourism is a growing industry in the rural areas and in the region. Eco-tourism, historic tourism, and providing a respite for people from urban areas of Atlanta, Columbus or Florida have been identified in the CEDS and by the local rural communities as important to develop and capture visitors. Places like Plains and Pine Mountain are already doing this, but it is becoming increasingly discussed in places like Buena Vista, Andersonville, and Fort Gaines.

Workforce and Education Summary of River Valley region

Population Projections
The region’s population estimate for 2030 is 471,121, almost 100,000 people more than the 2010 census count of 378,016. The majority of this population increase is in Muscogee County (Columbus), with an estimated 2030 population of 247,474. The current census estimate for 2012 is 198,413. The estimated population in the Combined Statistical Area (CSA), including Auburn, AL, is currently 501,649.

Major Educational/Workforce Training Initiatives
Throughout the region, there have been several efforts to improve education and digital intelligence. Moving beyond using computers, some schools in the region are integrating a digital culture that uses devices, robotics, and learning tools as an integral part of their work. What’s more, the new schools being built in the Urban Core using Special Local Option Sales Tax (SPLOST) funds are constructed as a 21st century well-wired data schools. The students are encouraged to use personal Wi-Fi devices, and the programming of the school encourages students to use Internet resources throughout the day to enhance learning through research or inquisitive inquiry on Wikipedia or search engines. Administrators have the options to throttle back or eliminate certain websites that would be a distraction or not serve academic purposes (Facebook for instance cannot be accessed using the schools Wi-Fi network and online gaming is not allowed).

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13 Aaron Cohen Middle School opened in 2013 and has used technology as an integral part of their learning environment, in part because of the physical spaces created. [http://www.2wrarch.com/middle-school-6/](http://www.2wrarch.com/middle-school-6/)
The Muscogee County School District has a thorough technology plan. Their plan includes not only their planned technology expenditures, but goes as far as addressing their digital waste (old computers). There are 11 stated goals in the MCSD technology plan that focus on student access and stakeholder use (parental portals to access websites, student information and ways in which the school district uses technology to communicate)\(^1\).

MIT has a youth-focused programming language called Scratchpad that provides opportunities to learn basic programming skills at a very young age\(^2\). It is available free and online. To be able to have access to this training tool anywhere, including in some of the most remote areas of our region, is a fantastic way to allow even the very youngest programmers access to simple, yet highly sophisticated programming language that will open the doors for more complex programming as they get older.

The educational resources in the River Valley region include four colleges – Andrews College in Cuthbert, a branch of Darton College in Cordele, Georgia Southwestern State University in Americus and Columbus State University. There are five technical colleges that serve the region, and two technical colleges that are based in the region: Columbus Technical College and South Georgia Technical College in Americus. The region has two major educational hubs. Columbus and Americus are home to both a state university and a community college and are regional draws with a pattern established of residents going to these locations for opportunities for higher education.

All of the technical colleges and universities have the capacity to train residents in computing and programming skills based on what the community needs. All of the schools have been given the RVRC survey data outlining training requested to help them identify and target course offerings based on the information and their own understanding of the demand. Because these are regional resources, rural areas of the region are accustomed to going to these regional schools.

Further, there are regional online efforts, particularly at Columbus State University, to help provide educational resources and often provide an option for college to rural residents that were not available

\(^1\) MCSD Three-Year Technology Plan: https://www.muscogee.k12.ga.us/AboutUS/Pages/MCSD-Technology-Plan.aspx  
\(^2\) Source: http://scratch.mit.edu/about/
Training and adult learning in the region mostly happens at the technical colleges or online. The technical college Quick Start program has been used statewide and in Columbus to help train individuals for particular software applications. There are also private for-profit universities like Strayer University and University of Phoenix that operate in Columbus.

There are two Workforce Investment Boards that operate in the region. One headquartered in Columbus, the other located in Americus. These can be sources for training and assistance in retraining can direct federal funding to help.

**Workforce Summary – Gaps**

A measure of entrepreneurship is difficult to obtain, but there are a couple of sources that help substantially. On the state level, the Kaufman Foundation has produced robust statistics measuring entrepreneurship based on an annual nationwide study it conducts. This gives Georgia an index rating of 240 entrepreneurs/100,000 population. (see table)

<table>
<thead>
<tr>
<th>State</th>
<th>Index Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Georgia</td>
<td>240</td>
</tr>
<tr>
<td>Atlanta MSA</td>
<td>280</td>
</tr>
<tr>
<td>Alabama</td>
<td>250</td>
</tr>
<tr>
<td>Tennessee</td>
<td>300</td>
</tr>
<tr>
<td>Florida</td>
<td>340</td>
</tr>
<tr>
<td>South Carolina</td>
<td>260</td>
</tr>
<tr>
<td>North Carolina</td>
<td>320</td>
</tr>
</tbody>
</table>

These numbers show Georgia behind all of its neighbors in this common measurement of entrepreneurship. In fact, the issues may be even worse given that the Atlanta MSA would account for a substantial portion of the state population and therefore entrepreneurs. Given that the MSA is greater than the state average, it is reasonable to assume that the rest of the state fares even worse. This data clearly points to a need to improve the resources and support to entrepreneurs throughout Georgia.

Another data source locally is the number of new business licenses issued by the local government. This is not an accepted practice used to measure the number of entrepreneurs, and cannot be compared to other jurisdictions, but it can provide a snapshot over time to see trends. Theoretically, the criterion to receive a new business license does not change appreciably year to year. Population does however, and the data provided here has been normalized to show new business licenses per 100,000 in population.

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16 CSU research into their online programs indicate that their student populations taking courses online are located in close proximity to the school. Even though they could be anywhere in the world, their effective target market is in the River Valley region. http://degreein3.columbusstate.edu/csu-degree-in-3/

Columbus, despite a growing population, has seen a steady decrease in the number of new businesses opened since 2010. This trend has largely been echoed elsewhere\(^\text{18}\). This data is different from the entrepreneurship measures done by Kaufman Foundation because it has been taken from different sources.

In another measure of entrepreneurship, the Information Technology and Innovation Foundation compiles an annual State New Economy Index that ranks states on a variety of metrics. The indicators used to compile and rank states includes the number of IT jobs, immigration of knowledge workers, inventor patents and e-government capabilities. Overall, the state of Georgia ranks 21 of the 50 states\(^\text{19}\). Georgia fared relatively well in indicators of job churning (8 of 50) and fast growing firms (11 of 50), but was in the bottom half in broadband access (33 of 50) and Research and Development (36 of 50). A full breakdown of the indicators used and Georgia’s rank can be found in Appendix C.

Training is also called for by small businesses as they develop better digital tools to assist with their work. Nationally, the developments of web-based tools and start-ups have created a niche by helping small businesses do their work more efficiently and better. Mobile apps, online review sites, social media and websites help spread the word about mom and pop small businesses, but online check-out systems and tools to assist monthly subscription services also popped up and can be accessed by businesses anywhere\(^\text{20}\).

**Computer Utilization**

According to ESRI Business Analyst, the Urban Core of Columbus has room to expand its market in the utilization of Internet sources. There are certain categories that point to a lack of investment in personal computing and digital technology.

The following graphs break down Rural, Rural Center and Urban Core information. Scores of 100 match national averages. Scores below 100 indicate measurements below national averages and scores above 100 indicate measurements above national averages.

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\(^{18}\) Ibid.

\(^{19}\) Source: http://www.itif.org/publications/2014-state-new-economy-index

\(^{20}\) Source: http://www.nytimes.com/2014/06/30/business/smallbusiness/modern-tools-for-mom-and-pops.html?module=Search&mabReward=relbias%3Ar%2C%7B%22%22%3A%22%22%3A%22%22%3A%12%22%7D&_r=0
Although most usage statistics for ESRI indicate Columbus is slightly lagging behind the expected averages based on a national statistics, most indicators are still within norms. There are no glaring deficiencies or areas in which the city has a disproportionate number of users. A complete table of available information analyzed is in Appendix D.

Computer Usage
It is interesting that one of the few data usage statistics that Columbus, Americus and Cordele exceed expected national averages is in online searches for employment.

The reluctance to pay bills online points to a lack of trust in data security. This is particularly notable in the rural areas, where people are almost half as likely as the national average to pay bills online. In fact, during our surveys, one of the open ended responses was “don’t trust tech to really do much financial transactions – too much hacking into systems”\(^2\). Work needs to be done to gain trust for online banking and bill payment. Part of this will be reliant on the local governments to provide this as a service for online bill payment. The local governments can model the online bill payment systems to get the population more accustomed to and trusting of e-payments.

\(^2\) More on the surveys and survey responses can be found in Appendix B
Internet usage, although lower than national averages, is within norms for the Rural Centers and Urban Core. It lags somewhat in the Rural areas, but it should improve as people in the rural areas find more reasons to be online and their methods of delivery improve.

Infrastructure

Urban Core
The Urban Core is well served by multiple Internet service providers, which is a bit unusual and benefits the city by creating a competitive marketplace.

Data speeds and reliability of the networks are roughly on par with national averages, although there are several cities in Georgia that enjoy faster overall speeds. According to Broadbandnow.com, Columbus’ average data speed is 21.7 MBPS, making it 7% slower than the rest of Georgia and the 297th fastest mid-size city in the United States\textsuperscript{22}. While this is slower than many cities, it still is a faster overall connection than cities like Macon, Athens, Carrollton and Gainesville.

A summary of Broadband Services and maps using GTA data is available in Appendix E.

\textsuperscript{22} Source: http://broadbandnow.com/Georgia/Columbus
Fewer people use dial-up services in the Urban Core than national averages, although there are also fewer people in the Urban Core who have access to the Internet at home, compared to national averages. High-speed availability is slightly lower than national averages, although 2/3 of the population does have access to high-speed Internet, which is within 10% of expected averages for Columbus.

Note that rural customers in our region are more than two times more likely than national averages to have a dial up connection. This is notable because dial up connections are notoriously slow, limiting the ability of these rural customers to fully use the resources of the internet.

One issue this planning process identified is the data about fiber availability through the city. Original maps showed very limited availability and mislabeled where it lay. Because of the proprietary information service providers and companies have on where they lay fiber networks, and therefore where it would be available, we could not simply use their maps. Another mapping solution was found that overlaid fiber availability with the zoning of industrial and commercial districts in the city. When presented to the service providers, they confirmed they could provide fiber where they had networks within the delineated areas identified in the revised map. This provides a very different visual picture of fiber availability for Columbus, showing a dramatic increase from previously available data.
Wireless is likewise available throughout the metro area. Although there is limited information on cell tower availability and capacity, the RVRC encourages all necessary investments by the service providers to keep all networks at maximum coverage and bandwidth. The development of new cell tower capacity is important for the network, and ease of approval process reduces the cost of operation. These cost savings should, theoretically, reduce the cost of service. The number of wireless service providers, and their natural competition for customers will help ensure the competitive market remains strong.

Community Anchor Institutions (CAI) throughout the region were contacted to determine their data connectivity. These include government offices, schools, and medical facilities. The CAI can be a source and reason to bring high-speed Internet to a community, thereby lowering the costs for other businesses to get online. A list of CAI institutions in the River Valley region can be found in Appendix F.

There are substantial Digital Economy infrastructure resources beyond the Community Anchor Institutions in the Urban Core. Although there are no technology incubators or maker spaces in Columbus, there are shared work spaces that serve to help incubate start-up businesses. Most notably, the Cunningham Center for Leadership Development at CSU is a high-design building established to help incubate new businesses. The start-up space at the Cunningham Center also houses the University of Georgia Small Business Development Center (SBDC) and the Georgia Tech Procurement Assistance
The tenant make-up of the Cunningham Center focuses on businesses that work with Fort Benning, including start-ups and established companies like General Dynamics and BAH.\(^{23}\)

The mobile tenant system at the Cunningham Center also provides a dynamic opportunity for new businesses to get out of the house and towards permanent space. While there are some available positions in the mobile tenant spaces, the permanent shared office space is currently full with a waiting list. There is one more month-to-month all-inclusive office space in North Columbus that rents space. The spaces at North Veterans Executive Center have been nearly completely rented in the past two years, showing a remarkable demand for this type of office space.

According to web sources, there is just one co-located data center owned and operated by Level 3 in the Urban Core, although AFLAC, Blue Cross/Blue Shield and TSYS all have very substantial IT data center resources in Columbus.

There are several call centers in Columbus, both company specific (AFLAC), and contract or for hire. These call centers have located to Columbus because of its competitive wages and infrastructure. These businesses are very valuable to have in the community as there are significant portions of the population who benefit from these jobs. With an overall unemployment rate consistently higher than the rest of the state (9.5% for 2013, 8.6% for June 2014), and with a history of low-wage jobs, the call centers introduce large portions of the economy to entryway Digital Economy jobs. The risks with these call center jobs are the uncertainty in the marketplace and that they tend to move quickly to the lowest wage opportunities.

**Rural Center and Rural**

Wired capabilities are available largely in the rural towns, but not in the unincorporated places of the region. Fiber is available in many of the towns in the River Valley region as well. For instance, some of the fastest measured speeds in the survey conducted by RVRC were from the library in Preston, a community in Webster County with fewer than 500 people.

Wireless capabilities in the rural areas outside of town limits become particularly important. In many cases, the residents of the unincorporated areas use 3G wireless technologies or satellite technologies to get online. As these technologies develop and as the cost comes down, more and more people are able to get online in areas outside the town limits. It also makes holes in the wireless network particularly troublesome.

The rural center also has several call centers that take advantage of the fiber availability as well as low cost labor. The match of a well wired community with a lower cost of living than other areas may be an area of growth potential to explore.

Through the Georgia Technology Authority mapping application and community discussions, RVRC has identified some particularly troubling holes in the wireless network. Knowing where the cell phone coverage is not available, we mapped the most recent traffic counts available from Georgia Department

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\(^{23}\) Source: http://officesatcunningham.com/ht
of Transportation for the major highways through the region. Cell coverage is lost on these roads that have an aggregate of 26,660 cars per day. This creates a health, safety and welfare issue for the region if an accident happens and the respondents are not able to call 911 from these dead spots.

Based on this research, RVRC recommends that the wireless providers do a more thorough review of the network focusing on the major highways and ensuring that those highways with more than 500,000 annual trips be prioritized as the wireless networks in our region continue to be upgraded.

*Wireless Coverage Map of Region – White indicates lack of cell coverage. Red numbers indicate GDOT traffic counts through areas that lose cell coverage. The highways selected are based on conversations with local residents and elected officials who have noted areas that consistently drop*
Capital – Urban Core
Capital availability is an issue for Columbus, both in the start-up process as well as in the general population. There is no infrastructure for angel investment or venture capital for start-up firms in Columbus. There is a significant portion of the city that does not have the resources necessary to invest in their own digital resources, education and technology.

That is not to say all is hopeless. The major companies in Columbus, and the core ownership of these major companies, provide a strong base from which to develop local venture capital. Recognizing the need to develop a source of funding to encourage a start-up culture, and the attraction that can provide for new companies and businesses to relocate to Columbus, emphasizes the importance of pursuing these new funding mechanisms. Already, TSYS is pursuing new lines of business with the TSYS Idea Center. There is an understanding in the local business community of the need to innovate.

There are small venture-capital efforts associated with the Hackathons that happen on a monthly basis. Shaffer Labs has provided start-up funding on a small scale to new ideas developed as a part of that process. There are no other investments into Columbus start-up companies other than friends and family and unsustainable personal debt. Work is ongoing to link some of the venture capital from Alabama sources that is going into Auburn University to the work we are doing in Columbus, but it will take some time to develop. Creating a common makerspace in Columbus will help to concentrate this work and provide not only a showcase location for products and ideas created in Columbus, but a chance to make it easier for venture capital outside the city and state to recognize what is happening in Columbus.

There are investment mechanisms in place for mature companies in Columbus. Both WC Bradley and Jordan Blanchard Capital are privately owned companies based in Columbus and both have a history of investments in and purchasing of companies. WC Bradley focuses on home and lifestyle companies while Jordan Blanchard Capital concentrates their businesses on the small to medium sized manufacturing sector. Further, the families that started the companies that sustain Columbus are still here. Their investment in the community has been substantial over the years, and that community wealth has the potential to allow Columbus to become one of the bright stars for investment in a new Digital Economy.

Evidence of the available capital in Columbus can be seen in the philanthropic work the community has been able to accomplish over time. The River Center, a performing arts venue in Uptown Columbus was a $100 million facility and is one of the finest performing arts venues in the southeast. It is home to Columbus State University’s world renowned music program and has seating capacity for 2,500.

24 Lucas Shaffer has also been instrumental in developing the Hack Columbus working group and involved throughout the city to help start entrepreneurial projects. More about Shaffer Labs and his business model can be found here: http://shafferlabs.com/
25 Garrison Keillor, one of the first performers at the River Center called it “a fabulous new auditorium that is as fine as any I've ever played in”. Source: http://en.wikipedia.org/wiki/RiverCenter_for_the_Performing_Arts
Capital – Rural Center and Rural

Capital availability in the Rural Centers and Rural places in the region is minimal. The median household income for Rural areas is $35,386. While this is below state averages of $47,209, it is roughly equivalent to the Columbus median household income of $39,577. Median household income of $25,948 for Americus and Cordele are well below these numbers. The Rural and Rural Centers will continue to rely on their intellectual capabilities and outside investment from Columbus, Macon, Atlanta, or elsewhere.

Current Digital Economy Project Highlights in the Region

There are plenty of interesting projects in the region. Three worth mentioning are a start-up medical service company, a music producer, and an annual design symposium. Other projects and links to their work are included in the following table.

Lightbulb Radiology is an example of a start-up in the River Valley region that is taking advantage of advances in digital technology in telemedicine. This business uses off-the-shelf cloud storage solutions that focus on medical images like X-ray, MRI or CT scans to provide one-on-one consultations or second opinions. Based in Columbus, the radiologist at Lightbulb Radiology can provide a consultation with anyone, anywhere. The combination of being able to access the images easily, and using standard web conferencing software, enables the radiologist to explain the imaging findings directly with the patient and answer any questions the patient may have.

The potential of businesses like this is tremendous and can potentially provide enhanced services in areas without medical facilities. Medical consultations, follow-up visits or preventative care could all be done in a very similar manner and may mean that rural areas could counter the frightening trend of small rural clinics closing.

Gr8 Traxz is the DJ name for Kevin Lamar Flowers. Kevin is a MIT-trained electrical engineer who used his talents learned in engineering and as the road drummer for Justin Bieber and other artists to become a sound and music producer.

His studio has a contractual relationship with Warner Brothers to do sound editing for film production. Their team won several awards for the James Bond movie Skyfall. Kevin’s studio – Opulent Studios in midtown Columbus is wired with fiber connectivity to the grid and uses cutting-edge sound mixing technology to create a music studio space that can collaborate with studios in California, New York, or elsewhere.

When meeting with Kevin for this project, he mentioned the new movie he was working on. Then he pulled it out of his wallet on a SD flash drive. The digital technologies make our working world literally and figuratively quite smaller, and with the right equipment and expertise, work can be done anywhere. That highlights why livability becomes so important in the Digital Economy.

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Strengths, Weaknesses, Opportunities, Challenges (SWOC Analysis)

SWOC Narrative

Urban Workforce
What is most notable about the Columbus workforce can be found in its list of major employers. Behind Fort Benning (which, with over 40,000 employees is the largest local employer) are two technology and service-based Fortune 500 companies – TSYS and AFLAC. These three employers locally employ 42% of the workforce in the Metropolitan Statistical Area (which includes portions of Alabama). Blue Cross/Blue Shield and Synovus are also private employers that use a substantial portion of the local population.

This deep supply of talented, knowledgeable workers provides a great opportunity to grow and build the technology back-office sector. In fact, this is a targeted employment sector for the Columbus Chamber of Commerce because of the employers here already and the talent pool of potential. The weakness, however, is that employers at TSYS, AFLAC, and Synovus have all reported challenges in finding qualified engineers and employees for upper management and high-tech positions. Their challenges in attracting qualified talent is a significant issue that needs a thorough and robust response locally through training or by creating a more attractive environment for new and outside talent to come to Columbus.

The good news is that there is tremendous opportunity to grow top talent using Columbus Technical College and Columbus State University. Furthermore, some of the best talent is being trained at nationally recognized engineering schools like Auburn University and Georgia Tech, both of which are a short drive from Uptown Columbus. Work to promote and enhance existing work-play amenities such as the whitewater course through Columbus has also happened, and should be an attractive selling point for the city.

The cost of mid-level talent (or workforce) is relatively inexpensive, and plenty of call centers and other technical jobs are readily filled locally. We must make sure, however, that workforce training is in sync with Digital Economy jobs and that lines of communication are open to ensure employers’ needs are filled locally. One excellent example of this communication and the local work to match employers’ needs with workforce is the apprenticeship program matching high school and Columbus Technical College students with real world work. This program has been recognized and awarded by the Georgia Youth Apprenticeship Unique Public-Private Partnership of the Year for two years in a row. The students have been partnered with Pratt and Whitney and Oneda Corporation in Columbus.

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27 AFLAC recruiting executives have in particular noted that IT Software Developers and Security Administrators and the most difficult positions to fill. Attracting and retaining these higher level skilled workers puts our S&P 500 companies in particular in a national competition with the very best employment talent. Source: conversation with Andrea Cruz of AFLAC – their corporate recruiter.

Urban Infrastructure
Columbus is blessed with an environment where we have multiple Internet service providers and that fiber is available throughout the commercially and industrially zoned areas of the city. The Small Business Development Center and Cunningham Center provide small business assistance, as do others, creating the backbone for supporting start-ups. However since the Cunningham Center space is fully occupied, there is currently no space to incubate local start-up businesses. Work has begun on developing a district of the city that would support the creative and Digital Economy. The City Village (See Appendix G) has the potential to build not only the digital infrastructure, but also to create the shared workspace that can spark new ideas, new solutions, and new businesses just as TSYS was developed in the 1950s. One opportunity that Columbus has to distinguish itself is to pursue Gigabit Service. This would place Columbus in rare company and serve to attract potentially high-qualified individuals to consider moving to the city. Anything which distinguishes Columbus from competitors for talent needs to be considered. As the workforce is more mobile, we have a rare generational opportunity to bring new, talented residents to Columbus.

Urban Capital
Columbus has a history of major innovation and is the home of innovative people. Starting with the development of the city as a mill town, then as an avenue to international markets, and as the home of Coca-Cola, Columbus has been a place of historic innovation and is at the leading edge of disruptive economies. The home-grown development of rural banking strategies and the business innovations that led to the creation of TSYS and AFLAC all point to a history of innovation in Columbus. The resource capital that both developed and still owns these companies remains largely in the area. These companies continue to provide the identity and backbone of this community. The companies and shareholders who have benefited from the good leadership and fortune of these companies are in a position to help financially kick start a new wave of Digital Economy businesses by developing a base of venture capital that can invest locally and make significant difference.

Conversely, the lack of purchasing power in significant parts of the Urban Core severely limit the ability to invest in the digital infrastructure needed to keep up with other mid-market cities of similar size. But because this is a deeply philanthropic city, the opportunities to tap into this source of capital to “teach a man to fish,” coupled with a deep ethic of hard work should provide avenues for smart investment that translates into significant work opportunities in the Digital Economy.

The challenge is to improve overall economic conditions to make digital access proportionally less expensive, and high-speed access easier for everyone.

Rural Center Workforce
The Rural Centers thrive in their niches to provide goods, services and a workforce for a wide geographical area. The Rural Centers of Americus and Cordele both house universities and technical colleges, which are instrumental in the training necessary for the Digital Economy. Already, both communities house call centers that were perhaps attracted to the communities by the low cost of land and labor. The Rural Centers have a workforce with moderate levels of digital technology, knowledge,
and usage, although fewer people may have the necessary digital knowledge to compete against bigger communities like Columbus or Atlanta.

The best opportunity the rural centers have is in the sectors that are critical to the state’s success. The thriving sectors of food production and agriculture support are both using digital sources to improve their efficiency and productivity.

Increasing the tourism opportunities and experiences for urban dwellers, the continued production of value-added agriculture, and the ability to sell products online provides additional opportunities in the Digital Economy.

The consequences of this shift in workforce to higher-level work certainly benefited many families by allowing them the freedom and flexibility to pursue education and better jobs. But it had, and continues to have, devastating consequences for the rural communities and rural centers. There is a worldwide shift to urban areas with fewer people, less political clout and fewer resources for the rural areas and rural centers.

A similar seismic shift in population could be happening now with the change to a Digital Economy. Advanced manufacturing requires advanced skills, and the rural areas could be a canary in the coal mine of what will happen if a community does not address its technical issues and the need for a well-trained and adaptive workforce. The consequences of this could be dire if there is not a shift in skills to this higher level work. There have been several articles written recently about the potential disruption in workforce that could occur in this shift to advanced manufacturing and the cost savings in even traditionally white-collar positions.

**Rural Center Infrastructure**

The good news for the Rural Centers is that their current wired capabilities are on par with the average speeds found in Atlanta and Columbus. Although the options for service are more limited than in Columbus, there are strong national providers who are offering the fastest data speeds currently available in the region.

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29 One of the most insightful reports on this shift is an article from The Economist about robotics and the future of work. “Immigrant from the Future” addresses the shift in work being undertaken by robots. From the very mundane like vacuuming a home to increasingly complex tasks like driving on public roads, a clear shift towards robotic assistance is at hand. Robots like the K6 are building cars at the KIA plant in West Point, GA, just outside the region. See: http://www.economist.com/news/special-report/21599522-robots-offer-unique-insight-what-people-want-technology-makes-their
We expect there will continue to be investment in the networks and digital infrastructure in the Rural Centers. The speeds are there, but anecdotal reports indicate improvements to reliability continue to be needed. An overall lack of population density may limit the ability to continue to invest without continued support from programs like Connect America or ConnectED.

One of the distinct advantages that Rural Centers have are the technical colleges and universities and the educational infrastructure they provide to adapt and change to support the changing nature of work in the Digital Economy.

*Rural Center Capital*

The advantages the rural centers have in terms of capital are not only the public investments in hospitals and schools, but the entrepreneurial efforts already underway. Businesses like Café Campesino in Americus and the Cordele Inland Port build not only workforce, but support larger clusters of businesses that can use the synergies to expand market share. That said, there are still concerns that a lack of overall community capital could hamper further development.

The opportunities in telemedicine and remote education offer real opportunities to both provide and receive services in Rural Centers. Research supports that online higher education is subscribed to mostly by individuals within the extended market of the local university. The same can be envisioned for telemedicine, where the local hospitals in Americus and Cordele use digital technologies in their own facilities and to connect with residents throughout their service area, for meetings and perhaps even diagnostics.

The challenge for Rural Center capital development is the overall lack of population density, and recent trends in declining populations. On the surface, these are significant issues, but further investigation suggests that what we are seeing is not necessarily a declining population, but rather a more mobile population.
Our Rural Centers continue to be a base of local workforce, and the buying capital associated with these employment centers is important. Continued employment growth and diversity will be critical to ensure that the population has the working capital to make the individual expenses on their broadband capabilities, in turn allowing the service providers the financial comfort to continue investing in the infrastructure.

**Rural Workforce**

The workforce in the rural areas has the advantage of already being engaged in the Digital Economy in agriculture. There are multiple cases of large farm operations that have significantly improved their workflow and efficiency by using digital tools such as automating tractors, GPS and mapping technology, drone technology, and mobile apps to control irrigation pivot arms. While useful drone technology is nascent in the region, it is expected to grow in importance in the years ahead. Getting a view of crops is interesting, but the real digital advantage small farm drones could have is in their ability to pinpoint crop disease and decline in specific locations in the field, giving the farmer an
opportunity to address the issues before more catastrophic crop failure occurs. This technology is promised, but is not in wide practice yet\textsuperscript{30}. Robotic control of irrigation is here, however, and in wide use across the region. The pivot arm can be controlled via a smart phone app, giving the farmer the ability to move, change times for irrigation, and even monitor whether the electrical lines are being tampered with. All this makes work much easier for the farmer.

The lack of population density and lower overall educational attainment as well as a lack of knowledge and skill create special problems though. The danger is that lower educational attainment and skills deficits may mean that in a future economy whole segments of the rural population will become essentially unemployable.

The good news is that the rural areas provide goods and services that are unique and needed not only for our region, but for the whole state. The role of the rural areas is not going to change substantially. Food and fiber production, jails, landfill operations, energy production and other goods that are not easily produced elsewhere can be accommodated in the rural parts of the region, but it requires continued good planning to ensure that natural and water resources remain protected.

**Rural Infrastructure**

Digital infrastructure continues to make strides in improvement in rural areas. Both wired and wireless networks are improving, but there continue to be holes in coverage and reliability.

There are still some small parts of our area that are completely unserved by any wireless. Cell coverage is lost on major transit routes throughout the region. The good news though is that the availability of wireless has brought more people and businesses online than ever. Significant portions of our population either use smartphones or other digital devices or can use satellite or 3G services wirelessly for their primary Internet service.

As wireless technology continues to evolve and improve, the cost of satellite will decrease and other providers will provide services in areas that were just not possible a few years ago. Continued investment in the digital infrastructure, especially wireless infrastructure, is needed in the rural areas of our region.

The wired infrastructure is largely available within city and town limits, although speeds and reliability are a concern. Continued investment in the wired infrastructure to make it both faster and more reliable is important. The good news is that with Community Anchor Institutions in every city and town in our region, there are fiber backbone resources in almost all incorporated areas in the region.

The exception to this is in Fort Gaines and Georgetown where a quirk of Ma Bell has these networks coming from Eufaula, AL. The connectivity cost and availability of high-speed Internet services is not good there. For instance, the library system in southwest Georgia has high-speed Internet at all of its

\textsuperscript{30} Conversation with Bob Kemerait, Associate Professor and plant pathologist with University of Georgia. August, 2014.
branches, but has to resort to lower speeds in Georgetown because it is just not viable cost wise to provide services equal to other places in the region.\(^{31}\)

**Rural Capital**
There is much changing with digital knowledge and digital use in the rural economy. The basics of commerce have fundamentally changed, with goods and even some services, now available anywhere in the world. Amazon packages with basic goods are distributed widely, limiting the problems most rural areas traditionally had in not being able to get all necessary goods locally. Now, with the few clicks of a mouse, goods can be selected and shipped. This mimics a mail order economy that has always been in place in rural areas, but makes the selection and delivery of goods all the easier.

Furthermore, the flow of goods can now be easily reversed, with products grown or produced in the rural River Valley region shipped anywhere in the world. [Merritt Pecan](#) is one such example. The state initiative, [Georgia Grown](#), is working to highlight these businesses and facilitate their exports and promote their business.

**SWOC Table**
The table below provides a brief description of the Strengths, Weaknesses, Opportunities and Challenges in each of the three distinct areas of the region as outlined in the narrative. The areas are broken into

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\(^{31}\) Conversation with Gary McNeally of the Kinchafoonee Regional library system.
Strategic Focus Areas

The Strategic Focus Areas which follow were compiled based on findings in this report and feedback from a thorough review by the list of stakeholders for this report. The Strategic Focus Areas were also sent out for comment to everyone who participated in the online survey portion of the report.

What Will Be Done with the Strategic Focus Areas
All stakeholders and communities will be given a copy of this report, with specific responsible parties notified of which sections they are recommended to address. The RVRC will keep the Digital Economy Plan as a part of its work plan in the future as a service to the communities we serve. This will help ensure that, as possible, we can assist with the action items on this list.