LOWCOUNTRY ECONOMIC DEVELOPMENT DISTRICT

COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

(UPDATE) 2017

PREPARED BY

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I.   INTRODUCTION

The Lowcountry Council of Governments (LCOG) is officially designated as the US Department of Commerce/Economic Development Administration's (EDA) district representative and administers the Comprehensive Economic Development Strategy (CEDS) for the Lowcountry Economic Development District (LEDD). The LEDD is comprised of the Counties of Beaufort, Colleton, Hampton and Jasper. The CEDS is a local planning process designed to develop strategies, which can stabilize or expand economies through job creation and diversification.

This document:
1.   presents the regional trends and conditions that affect and impact the local economy,
2.   evaluates the economy of the LEDD,
3.   identifies possible goals and solutions which could address the area's development potential and shortcomings,
4.   offers strategies and action plans for implementing a planned program of growth for the future, and
5.   summarizes the standards for the evaluation of the achievements of the program.

Public works and economic development projects funded by the EDA must be consistent with the district's CEDS. Annually, LCOG summarizes and evaluates the past year's activities and when appropriate, presents new or modified program strategies. The CEDS and accompanying annual report help to maintain the district's eligibility for EDA funded projects.

Funding for the CEDS is through the EDA planning assistance grant under Section 301(b) of the Public Works and Economic Development Act of 1965, as amended.

II.   ORGANIZATION AND MANAGEMENT

LCOG is one of ten regional councils in South Carolina. LCOG provides a method for intergovernmental coordination and cooperation beyond the local level. Initially formed as the Lowcountry Regional Planning Commission (LRPC) on April 22, 1969, in accordance with South Carolina law, LCOG's purpose is to:

1.   undertake multi-purpose, area-wide development planning;
2.   support economic, natural, social, physical and governmental development activities in the area; and
3.   promote cooperation and coordination among the various public and private agencies and organizations in the area. In 1976, the name "Council of Governments" was adopted to give a more common recognition to all regional councils in South Carolina and their objectives.

LCOG's expertise lies in providing professional and technical guidance and assistance in various governmental activities, particularly the area of economic development. LCOG undertakes projects that use the resources of the region to meet and overcome common problems. In 1991, LCOG further clarified its role in the region by establishing a mission statement and goals for program areas. LCOG's mission is to:

> **Improve the Lowcountry Region's livability through cooperative intergovernmental relationships and responsible development of resources.**

LCOG's program areas and goals:

- **Community and Economic Development:** Advocate progressive economic policies and administer sound economic and community development programs.

- **Health and Human Resources:** Coordinate and support a continuum of human resource service systems.

- **Workforce Development:** Coordinate and consolidate employment and training services in order to meet the needs of area employers and job seekers.

- **Growth Management and the Environment:** Provide responsible development guidance, environmental management, and stimulate recreational and cultural opportunities.

- **Administration and Support:** Provide a foundation for successful council and local government program development and implementation.

LCOG's Board of Directors is comprised of thirty-three (33) representatives, which are appointed by elected officials, and come to the board with varied occupational backgrounds. A full listing of the current board roster is in Appendix A.

For Beaufort County, seven of the thirteen members are appointed by Beaufort County Council, one member appointed by the Beaufort City Council, one member appointed by the Port Royal Town Council, two members appointed by the Hilton Head Island Town Council, one member appointed by the Bluffton Town Council, and one member appointed by the Beaufort County Legislative Delegation. The member composition for the eight Colleton County members includes five appointed by Colleton County Council, one appointed by the Walterboro City Council, one appointed by the Cottageville Town Council (non-voting board member), and one appointed by the Edisto Beach Town Council (non-voting board member). From Hampton County, the seven members include three appointed by Hampton County Council, one appointed by the Estill Town Council, one appointed by the Hampton Town Council, one appointed by the Varnville Town Council, and one appointed by the Yemassee Town Council (non-voting board member). The five Jasper County members include three appointed by Jasper County Council and one each appointed by the Hardeeville City Council and the Ridgeland Town Council.

III.   THE LOWCOUNTRY ECONOMIC DEVELOPMENT DISTRICT AND ITS ECONOMY

A.   Background Information/Historical Context

1.   General Description

The LEDD, comprised of the Counties of Beaufort, Colleton, Hampton and Jasper, is an area endowed with an abundance of pristine natural resources and a rich cultural and historic heritage. The district is located in the southern corner of the state and spans approximately 3,306 square miles in a coastal plain region. The center of the district is located roughly 40 miles northeast of the City of Savannah, Georgia, 55 miles southwest of the City of Charleston and 100 miles south of the City of Columbia. Interstate 95, the primary East Coast north-south transportation corridor transects the region.

Three of the four Lowcountry counties, all of which are bounded by rivers, have areas that adjoin the Atlantic Ocean. Nearly 30 miles of the eastern coast of Beaufort County and tips of Colleton and Jasper Counties abut the Atlantic Ocean. The southern boundary of Jasper and Hampton Counties is the Savannah River, which also represents the border between the States of Georgia and South Carolina. Hampton County's northern boundary is the Combahee River while Colleton County's northern boundary is the Edisto River.

2.   LEDD Land Use

The LEDD contains extensive wetlands, marshes and swamps, which have made commercial and residential development efforts more complicated in many areas. Generally, the Lowcountry area, with the exception of Beaufort County, is sparsely populated. Recreational activities such as, fishing, boating and hunting have profited from the abundance of natural resources, low density of population and mild climate.

TABLE I: *Area and Density of Lowcountry Counties*

County	2010 Population	Total Square Miles	Land Area Sq. Mi.	Water Area Sq. Mi.	Population/ Sq. mi. (land)
Beaufort	162,233	923	587.03	335.98	276.36
Colleton	38,892	1,132.05	1056.48	75.57	36.81
Hampton	21,090	562.72	559.93	2.78	37.67
Jasper	24,777	685.84	654.33	31.51	37.86
Lowcountry Region	246,992	3,303.61	2857.77	445.84	86.43
South Carolina	4,625,364	32,020	30,060.70	1,959.3	153.9

Source: The US Bureau of the Census, 2010.

Geographically, Colleton County is the largest area in the region, followed by Beaufort County (*See Table I*). The most densely populated county in the region is Beaufort whose density is more than five times greater than Colleton, Hampton and Jasper Counties and almost twice as dense as the state average of 153.9 persons per square mile. In addition, roughly one-third of Beaufort County's total area is water while the total area of each of the other three counties is less than 7 percent water.

Over the last 200 years, extraordinary circumstances have altered land use in the Lowcountry from a predominately agrarian economy that was substantially rural and economically depressed to one that is

slowly diversifying while staying true to some traditional industries of the region. This began mid-century, in the 1950's, when the Lowcountry began to reemerge economically. Farm yields increased despite a drop in the percent of land farmed.

Agriculture and forestry have been mainstays of the economy since the late 1600's and continue to dominate the economies of Colleton, Hampton and Jasper Counties. However over the last 30 years in the Lowcountry, residential and commercial development has increasingly claimed the land in Beaufort County and in southern Jasper County. This trend is also starting to be seen in more recent years in the balance of Jasper County, Colleton and Hampton counties.

Along the eastern seaboard from Georgia north, the largest land use is forests. Nearly two-thirds of the land in the Lowcountry is classified as forest, totaling 1,157,823 acres in the four-county area. (U. S. Department of Agriculture, Forest Service, Forest Statistics for South Carolina, 1993, Resource Bulletin SE-141, November 1993) While agriculture and forestry remain important in the Lowcountry region there has been a shift to value added agriculture and forestry commodities being produced.

Beaufort County. Beaufort County, named for Lord Proprietor Henry Somerset, Duke of Beaufort, was officially established in 1769. Much of Beaufort County's 923 square mile area is made up of over sixty islands, marshes, creeks, swamps and inlets. Water covers approximately one-third of the county. Beaufort County is divided into northern and southern areas by the Broad River, which empties into the Atlantic Ocean at one of the county's two sounds, Port Royal. The Combahee River joins the Coosaw River to flow into the ocean at St. Helena Sound.

The northern area of Beaufort County includes Port Royal Island, Lady's Island, and St. Helena Island. Port Royal Island, the largest and most populated island is fully developed. The City of Beaufort and the Town of Port Royal are located on Port Royal Island. Immediately east of Port Royal Island is Lady's Island, a rapidly-growing residential area in the northern area. The City of Beaufort serves as the county seat. East of Lady's Island is the St. Helena Island district that includes the seas islands of St. Helena, Hunting Island (a State Park) and Fripp Island (a Planned Unit Development).

Major population centers in the southern area of Beaufort County are the Town of Hilton Head Island, the Town of Bluffton and the US Highway 278 Corridor between Hilton Head and I-95 in Japser County. Hilton Head Island is the most densely populated and commercialized district in the southern region largely because it is a major international resort and tourist destination.

Of the 235,496 acres that encompass Beaufort County 71.4% is defined as either rural/undeveloped or preserved land based on the County's 2010 Comprehensive Plan.

Colleton County. Colleton County is one of the three original counties established in South Carolina in 1682. In 1662, King Charles II granted 12,000 acres of land to Sir John Colleton, Lords Proprietor. Colleton County is the fifth largest county in the State, covering 1,056.48 square miles. There is access to the Atlantic Ocean at Edisto Island, but primarily this is an inland agricultural county. The City of Walterboro has been the county seat since 1822.

Hampton County. Hampton County was created in 1878 after residents petitioned to break away from Beaufort County and establish their own county seat. The county is named for General Wade Hampton, one of South Carolina's greatest statesmen and military leaders. The county seat is located in the Town of

Hampton. Roughly 68 percent of the 563 square miles land area is forested which along with agriculture dominates the county's land use.

Jasper County. Formed from parts of Beaufort and Hampton Counties, Jasper County was established in 1912. The county is named for a Revolutionary War hero Sergeant William Jasper. One of the signers of the Declaration of Independence Thomas Heyward, Jr. also came from Jasper County. The Town of Ridgeland serves as the seat of government for Jasper County. Traditionally, Jasper County's land has been used for forestry and agriculture. However, southern Jasper County is experiencing significant growth due in part to the growth along the US Hwy 278 corridor and its proximity to Savannah.

3.   Natural Resources/Climate and Geography

The Lowcountry Region is part of the Southern Climatic Division of the State of South Carolina. The region features a coastal climate that is characterized by hot, humid summers and cool winters. According to the U. S. Department of Commerce's National Climatic Data Center, the annual average temperature is 63.8 degrees. The average daily high is 75.3 degrees. The average daily low is 52.3 degrees. The annual normal precipitation is 44.3 inches.

The counties of the Lowcountry are part of the coastal plain; an area of land created as the result of the ocean's receding. Millions of years ago the Lowcountry was underwater as a part of the continental shelf. The shelf is relatively flat and covered to a large extent by rain-eroded rock fragments from mountains and hills, along with dirt and clay from the lowlands.

The Lowcountry District has no known precious metal deposits, and the soil is composed of primarily sand and some clay materials. The mining or use of these materials is limited to local use in roads and masonry products.

The natural resources of greatest significance are the water, forest, marsh and wetlands in the district. These areas support a wide range of critical habitat for birds, animals and fish. Many in the Lowcountry are concerned and active in protecting these natural resources and habitats. This can be evidenced in many ways including but, not limited to, the ACE Basin Project and the efforts made by several counties to establish land trusts.

4.   Environmental Issues

Issue 1: Coastal growth and wastewater disposal

Minimizing the environmental effects of sewage disposal through planning is addressed in Section 208 of the Federal Clean Water Act and implemented at the state level in Area-wide Water Quality Management Plans (208 plans). LCOG administers the 208 plan for South Carolina's Region X. The principle concern of 208 planning in this region is the proper disposal of treated waste effluent. The Lowcountry area is a region that contains marshes and water bodies with ORW (outstanding resource waters) ratings—the highest quality possible. Consequently, environmentally sound disposal sites for waste effluent are limited in number. Currently, most wastewater in the coastal zone is being sprayed on golf courses and tree farms. However, whether this practice can increase without increasing the risk of contaminating groundwater supplies is not clear. Therefore, the ability to safely dispose of wastewater may become a constraint to coastal development in the near future.

Issue 2: Infrastructure Development for southern Beaufort County and Jasper Counties

Rapid growth is now taking place in Southern Beaufort and Jasper Counties. In anticipation of this rapid growth, the Beaufort Jasper Water Sewer Authority (BJWSA) built a wastewater treatment plant in the Cherry Point area several years ago and brought online a new water distribution system connected to the BJWSA's Chelsea water plant. BJWSA also in recent years built a new water treatment facility along the Savannah River at Purrysburg to meet expanding water needs. South Carolina Electric and Gas, seeing the need to address electricity demand in the Lowcountry built a new natural gas fueled power plant in Purrysburg as well.

In addition to water and sewer infrastructure and electrical needs, the US 278 Connector has been completed to assist with transportation needs in the Lowcountry.   The Connector links US 278 to Interstate 95 at exit 8 in Hardeeville.   The completion of this highway further prepared the areas of Hilton Head Island, southern Beaufort and Jasper Counties for growth. A main concern here is how to maintain the high environmental quality and visual character of this rapidly developing area and have it coexist with new development.

5.   Political Geography

County Governments. The four county governments within the Lowcountry Economic Development District have the council-administrator form of government. Beaufort County is divided into eleven political districts with each district represented by a member on council. Colleton County has five council members elected to four year terms as follows – two from the eastern district, two from the western district and one at-large for the entire county. Hampton County has a five-member county council that is elected at-large for four-year terms. Jasper County has a five member council with four single member districts and one at large; all seats have four year terms.

Beaufort County Municipal Governments. There are four municipalities in Beaufort County: City of Beaufort, Town of Port Royal, Town of Bluffton and the Town of Hilton Head Island. The City of Beaufort, located on Port Royal Island, is the county seat. It contains 4,566.6 acres. The City has the council-manager form of government. An elected mayor and four council members are elected at-large for four-year terms. The city manager is hired by the council and serves at its pleasure.

The Town of Port Royal, also located on Port Royal Island, contains 1,440 acres. Like the City of Beaufort, the town has the council-manager form of government. An elected mayor and four council members are elected at-large for four-year staggered terms.

The Town of Bluffton, located along the May River in southern Beaufort County has the council-manager form of government.   The town has an elected mayor at 4 years and four councilpersons four-year staggered terms, all elected at-large. As a result of recent annexation efforts, the Town of Bluffton covers 38,012 acres and is the largest municipality in the county in terms of land area.

The largest municipality in the county, in population, is Hilton Head Island. With about 26,900 acres, this is the second largest island on the East Coast of the United States. The Town has the council-manager form of government. The mayor is elected at-large and six council members are elected single member districts (wards) for four-year staggered terms.

Colleton County Municipal Governments. Colleton County has six municipalities: Town of Cottageville, Town of Edisto Beach, Town of Lodge, Town of Smoaks, City of Walterboro and the Town of Williams. Walterboro, a 2,995.2-acre city located near the center of the county, is the county seat. The seven-member council, including the mayor, is elected at-large. The city operates under the council-manager form of government.

The Town of Edisto Beach operates under the mayor-council form of government. This resort community has a mayor and five council members, all elected at-large. The small rural Towns of Cottageville, Lodge, Smoaks and Williams all operate under the mayor-council form of government, and have five at-large elected council members and a mayor.

Hampton County Municipal Governments. In Hampton County, there are nine municipalities: The Towns of Brunson, Estill, Furman, Gifford, Hampton, Luray, Scotia, Varnville and Yemassee. The Town of Hampton, a 2,816-acre community, is the county seat. The town operates under the council form of government. The mayor and the four council members are elected at-large and serve four-year staggered terms.

The Town of Estill has the council form of government and employs a city administrator to manage the day-to-day activities of the town. The mayor and four council members are elected at-large. Brunson, Gifford, Luray, Scotia, and Yemassee are all operated by a mayor-council form of government with mayors and council members elected at-large. Furman and Varnville have the council form of government with a mayor and four councilpersons elected at-large.

Jasper County Municipal Governments. There are two municipalities in Jasper County: Ridgeland and Hardeeville. Ridgeland, centrally located in the county, serves as the county seat. The town has the council form of government with a mayor and four councilpersons elected at-large. The City of Hardeeville, in the southern part of the county has a council-manager form of government and five council members (including the mayor) who are elected at-large for four-year terms.

6.   Population and Labor Force

Population. South Carolina's population has grown by 15 percent between 2000 and 2010 (*See Table II*). Over this same period, the population in Beaufort County grew by 34 percent. Colleton, Hampton and Jasper County's rates of growth were substantially less, at 1.6, -1.4 and 19.8 percent respectively. The rate of population growth in the state was slower in the 2000's than in the 1990's. However, the growth rate in the LEDD continues to be greater overall than that of the State's in the last decade.

TABLE II: Population by County, Region and State, 2000-2016

	2000	*2010*	*Percent Change 2000-2010*	*2016*	*Percent Change 2010-2016*
Beaufort County	120,937	162,233	34.1%	171,569	5.75%
Colleton County	38,264	38,892	1.6%	38,549	-0.9%
Hampton County	21,386	21,090	-1.4%	20,167	-4.4%
Jasper County	20,678	24,777	19.8%	29,137	17.6%
Lowcountry Region	201,265	246,992	22.7%	259,422	5.0%
South Carolina	4,012,012	4,625,364	15.3%	4,961,119	7.3%

Source: U.S. Census Bureau, Census of Population for selected years.

The Lowcountry Region as a whole, is experiencing a consistent growth in population. Since 2010 this growth has slowed but it is still occurring, particularly in Jasper County which is growing at least 10 percent faster than the state as a whole. As a region, the population has increased by 23 percent between 2000 and 2010 from 201,265 to 246,992 persons. Most of increase occurred in Beaufort County, which grew by 41,296 persons or about 35 percent through the 2000's.

Our remaining counties experienced differing situations regarding population. Jasper County continues to pace with Beaufort County experiencing a 23% increase in population. Colleton County and Hampton County's population changes were negligible with Colleton showing a slight increase in population and Hampton showing a decrease from 2000.

TABLE III: *Age Distribution by County, Region and State, 2010**

	0-14	15-24	25-44	45-54	55-64	65+
Beaufort	29,079	21,712	37,671	18,580	22,159	33,032
	(17.9%)	(13.4%)	(23.2%)	(11.5%)	(13.7%)	(20.4%)
Colleton	7,800	4,911	8,866	5,763	5,474	6,078
	(20.1%)	(12.6%)	(22.8%)	(14.8%)	(14.1%)	(15.6%)
Hampton	4,146	2,753	5,563	3,103	2,696	2,829
	(19.7%)	(13.1%)	(26.4%)	(14.7%)	(12.8%)	(13.4%)
Jasper	5,116	3,720	6,902	3,524	2,728	2,769
	(20.7%)	(15.0%)	(27.9%)	(14.2%)	(11.0%)	(11.2%)
Region	46,141	33,096	59,002	30,970	33,057	44,708
	(18.7%)	(13.4%)	(23.9%)	(12.5%)	(13.4%)	(18.1%)
State	840,401	577,091	1,185,955	550,321	372,911	485,333
	(20.9%)	(14.4%)	(29.6%)	(13.7%)	(9.3%)	(12.1%)

Source: U.S. Census Bureau, Census of Population, 2010
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The median age throughout the United States has continued to rise. In the State of South Carolina, the median age increased from 35.4 to 37.9 years of age between 2000 and 2010. On a county level in the Lowcountry, changes in the median age vary. Beaufort County's median age increased the most, from 35.8 to 40.6 years old. Colleton County's 2000 median age of 40.7 is the highest of the four counties and slightly higher than the state's.

The expanding population of persons age 65 and over supports the increase in median age. Beaufort County has experienced the largest increase in this bracket, with nearly twice the number of persons from ten years earlier. In addition, with the continued development of Sun City Hilton Head and other residential developments targeted to seniors, the average will increase. The other counties experienced smaller increases as well.

At the other end of the age spectrum, Beaufort County contains the smallest percentage of population in the youngest age bracket compared to the other three counties. *(See Table III.)* In Colleton, Hampton and Jasper Counties, the percent of total population, 14 years old or younger, is larger compared to either Beaufort County or the State. On the other hand, the percentage of persons 18 to 64 (the working years) is 1-3 percentage points less than the State's.

The racial composition of the Lowcountry Region has experienced some changes in characteristics that are not unlike what is occurring nationwide. *(See Table IV.)* The percentage of the region's population that is

of Hispanic origin is only 10.2% which is higher than the State percentage. As a percentage Jasper County has continued to have the fastest growing Hispanic population in the Region.

TABLE IV: *Racial Mix by County, Region and State, 2010-2016*

	Hispanic origin (of any race)		White		Black	
	Total	*%*	*Total*	*%*	*Total*	*%*
2010						
Beaufort	19,567	12.1%	116,606	71.9%	31,290	19.3%
Colleton	1,094	2.8%	22,173	57.0%	15,178	39.0%
Hampton	744	3.5%	8,999	42.7%	11,359	53.9%
Jasper	3,752	15.1%	10,658	43.0%	11,406	46.0%
Region	25,157	10.2%	158,436	64.1%	69,233	28.0%
State	235,682	5.5%	3,060,000	66.2%	1,290,684	27.9%
2016						
Beaufort	21,012	12.2%	126,481	73.7%	34,729	20.2%
Colleton	1,296	3.4%	21,951	56.9%	14,546	37.7%
Hampton	810	4.0%	8,351	41.4%	10,710	53.1%
Jasper	3,800	13.0%	12,389	42.5%	12,241	42.0%
Region	26,918	10.3%	169,172	65.2%	72,226	27.8%
State	254,395	5.5%	3,213,417	68.5%	1,364,308	27.5%

Source: US Census Bureau and ACS Data

Education. Educational attainment, (as measured by the percentage of persons 25 years or older who have four years of high school and with four or more years of college), made great improvement in South Carolina over the last several decades. In the Lowcountry we have appeared to have caught up to the state averages in a number of areas; however Beaufort's numbers skew the region picture. In Colleton, Hampton and Jasper County's numbers still lag behind the state in a number of areas particularly when looking at the percentage of people pursuing degrees beyond high school. Depending on the county, the average runs 6 to 7 points behind the state averages; however, Beaufort County citizens' educational attainment in the same categories is much higher than the state average. *(See Table V.)*

TABLE V: *Educational Attainment by County, State and Nation, 2000-2015*

Educational Attainment 2000	Beaufort County	Colleton County	Hampton County	Jasper County	South Carolina	United States
Less Than High School Diploma or Equivalent	12.2%	30.4%	33.1%	34.9%	23.7%	19.6%
High School	24.2%	37.0%	37.8%	35.9%	30.0%	28.6%
Some College, Associates	30.5%	21.1%	19.1%	20.5%	26.0%	27.4%
Bachelors	21.6%	7.4%	7.2%	6.2%	13.5%	15.5%
Graduate	11.6%	4.2%	2.9%	2.6%	6.9%	8.9%
Educational Attainment 2010	**Beaufort County**	**Colleton County**	**Hampton County**	**Jasper County**	**South Carolina**	**United States**
Less Than High School Diploma or Equivalent	9.4%	24.7%	24.1%	25.1%	17.0%	14.9%
High School	24.2%	39.1%	41.0%	39.6%	31.2%	29.0%
Some College, Associates	29.0%	22.6%	23.9%	25.8%	27.8%	28.1%

Bachelors	23.2%	9.5%	7.6%	6.7%	15.5%	17.6%
Graduate	14.1%	4.2%	3.3%	2.7%	8.4%	10.3%
Educational Attainment 2015	**Beaufort County**	**Colleton County**	**Hampton County**	**Jasper County**	**South Carolina**	**United States**
Less Than High School Diploma or Equivalent	7.9%	17.8%	22.15%	21.16%	14.43%	13.35%
High School	23.36%	37.94%	41.82%	36.88%	29.77%	27.77%
Some College, Associates	29.90%	30.27%	25.45%	26.97%	29.95%	29.11%
Bachelors	23.12%	8.80%	6.71%	10.28%	16.52%	18.52%
Graduate	15.67%	5.23%	3.87%	4.71%	9.32%	11.25%

Source: US Census and ACS Data

On the other end of the spectrum in the Lowcountry, the percentage of persons twenty-five years and older with less than a 9th grade education is disconcerting. Colleton, Hampton, and Jasper Counties all have averages higher than the state's average of 13.35 percent.

Workforce. As indicated in Table VI below the vast majority of the labor force in the Lowcountry region is employed. Currently no counties are experiencing unemployment in the region above the national average of 4.2 percent. Jasper County maintains the lowest level of unemployment with a rate of 3.3 percent and Colleton County has the highest unemployment of 4.3 percent. However these numbers do not show a clear picture of the problems faced by the Lowcountry, the issue here is not only unemployment but underemployment.

TABLE VI: Labor Force Data September 2017

COUNTY	LABOR FORCE	TOTAL EMPLOYMENT	UNEMPLOYMENT	% UNEMPLOYED
Beaufort	73,050	70,342	2,708	3.7
Colleton	17,391	16,639	752	4.3
Hampton	8,326	7,979	347	4.2
Jasper	12,049	11,651	398	3.3
Region	110,816	106,611	4,205	3.8
State	2,324,112	2,232,770	91,342	3.9
US	161,146,000	154,345,000	6,801,000	4.2

Source: South Carolina DEW, Bureau of Labor Statistics

7. Economy

The survey of average rates of selected occupations *(See Table VII)* offers a quick overview of some of the similarities and variances that occur in the Lowcountry Region as well as the state. Similarities in wage rates are most prevalent in the highest and lowest wage rate categories. The rates among the industries varied from county to county. The establishment of wage rates in general is the result of labor supply and demand.

TABLE VII: Average Weekly Wage Rates by Industry for Employees for the Second Quarter 2017

Occupation	Beaufort	Colleton	Hampton	Jasper	LEDD	SC
Agriculture, Forestry, Fishing, Hunting	575	747	992	842	724	669
Construction	925	750	738	845	887	1,014
Manufacturing	870	746	994	688	-	1,131
Utilities	1,265	1,372	1,212	-	1,396	1,503
Wholesale Trade	1,161	1,000	-	1,044	1,112	1,249
Retail Trade	500	436	403	688	511	520
Transportation & Warehousing	743	742	835	818	-	833

Finance & Insurance	1,411	770	747	1,729	1,327	1,184
Health Care & Social Assistance	922	688	612	577	830	933
Real Estate & Rental, Leasing	839	680	896	885	834	823
Public Administration	998	679	823	751	889	857

Source: South Carolina Department of Employment & Workforce, Covered Employment and Wages 2017

The lower than average wages that predominate in the Lowcountry region make it difficult for low-to-moderate income families to survive. These families represent a slightly larger portion of the region's population, depending on the county than the State percentage *(See Table VIII).*

Table VIII: Persons of Low to Moderate Income by County, 2017

COUNTY	LMI PERSONS	% LMI
Beaufort	57,710	38.99%
Colleton	16,605	43.02%
Hampton	11,935	38.65%
Jasper	9,305	41.60%
LEDD	95,555	41.79%
South Carolina	819,620	38.26%

Source: HUD Exchange, FY 2017 LMISD local governments by county, based on ACS 2006-2010

While the number of people living below the poverty level in the Lowcountry region as well as the State of the past several decades has decreased, the area still has a slightly higher than state percentage of people living in poverty with only Beaufort County's poverty rate being below the state average. However, in the majority of the counties of this region, the percentage of people below poverty is between 3 and 5 percentage points higher than the State proportion. *(See Table IX.)*

Table IX: Poverty Rates in the Lowcountry 2000-2015

	2000	2005	2010	2015
Beaufort	10.3	11.5	10.5	12.8
Colleton	19.3	23.9	21.3	22.3
Hampton	20.0	23.9	20.8	20.8
Jasper	22.2	24.8	21.5	23.5
South Carolina	12.8	15.6	16.4	17.9

Source: U.S. Census- Small Area Income and Poverty Estimates for selected years.

A comparison of per capita incomes among the four counties and the state *(See Table X)* provides insight into the relative economic status of the Lowcountry counties. Based on per capita income, Beaufort County has a higher per capita income than South Carolina. This is due to the large number of retirees that have moved to Beaufort County and is not indicative of local economic activity. The counties of Colleton, Hampton and Jasper are behind state figures. The contrast in per capita incomes between these three counties and Beaufort County indicates that a wide range of economic well being exists within the region.

Table X: Per Capita Income by County and State, 2000-2015

COUNTY	2000	2010	2015
Beaufort	$25,377	$32,731	$32,401
Colleton	$14,831	$17,842	$19,015
Hampton	$13,129	$16,262	$20,046
Jasper	$14,161	$17,997	$17,565
South Carolina	$18,795	$23,443	$24,604

8.   Infrastructure and Services

Transportation. The routing of cars, trucks, and railroads is influenced by the extensive marshlands and wetland areas, as well as the many rivers and streams that criss-cross the Lowcountry. Historically, these natural barriers had a great effect on the development and growth of commercial and residential centers. Today, primary and secondary highways serve as connectors between major population areas.

Interstate 95 (I-95), the main eastern seaboard artery built in the late 1960's and early 1970's, transects three of the counties in the four-county district. Each year, more than 14 million cars and trucks pass through Colleton, Hampton and Jasper Counties on I-95[1]. Near the center of the LEDD at Exit 33 (US 17 and I-95), roughly 1.5 million vehicles enter or exit I-95. Many of these cars and trucks join with traffic coming from Port Royal Island at Gardens Corner to be part of the roughly 3 million vehicles that travel toward Charleston on US 17 each year.

The largest commercial districts in the region experience the largest volumes of traffic. On and approaching Hilton Head Island along US 278, the average annual daily traffic counts conducted by the SC Department of Transportation (SCDOT) were 54,700 vehicles per day. The average daily traffic counts recorded in and around the City of Beaufort (US 21, SC 170, SC 281 and SC 802) range from around 15,400 to 34,600 vehicles. Most of the other primary roads in Beaufort County have higher average daily traffic counts than what is reported on roads in the other counties.

In Colleton County, the roads (other than I-95) with the highest traffic counts are US 17, US 17-A, SC 63, SC 64 and US 15. US 17-A is the main artery between Charleston and Walterboro, carrying a range of 12,600 to 17,800 vehicles per day.

The areas where the traffic counts are highest in Hampton County are in and near the Towns of Hampton and Varnville along US 278 (11,800 AADT), US 601 (2,700 AADT), and SC 363 (3,400 AADT). The traffic counts for the main north-south corridor, US 321 which passes through the Town of Estill, average around 6,000 AADT.

The most traveled roadway in Jasper County is the Interstate. I-95 carries between 47,800 to 56,700 vehicles per day. Other heavily traveled highways include US 17, US 278, US 321, SC 46, SC 170A, SC 336, and SC 462. Average traffic flows vary from as little as 3,600 AADT on SC 462 in the northern parts of the county to as much as 29,800 AADT on US 278 near Hardeeville. Higher traffic flows exist near and in the Towns of Hardeeville and Ridgeland. The high traffic counts recorded in the rural areas of the county can be attributed to the vehicles that travel between Hilton Head Island and Beaufort and I-95 or Savannah.

Due to the geography of the LEDD and its coastal nature, it is paramount that the transportation system be maintained and improved as needed to meet the demands of a hurricane evacuation when necessary. US 21, I-95, US 278, and US 321 all serve as key evacuation arteries for the LEDD and need to be maintained. LCOG has updated a regional disaster preparedness plan which will address specifically evacuation transportation. Also LCOG has recently completed a Long Range Transportation Plan which recommends heavily weighting projects that address the regions evacuation routes.

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[1] Average Daily Traffic Counts are from 2016 and were prepared by the SC Department of Transportation.

Water, Sewer and Solid Waste. Currently there are adequate supplies of potable water in the LEDD. Municipalities in Colleton, Hampton and Jasper Counties and the Beaufort-Jasper Water and Sewer Authority (BJWSA) and the Lowcountry Regional Water System (LRWS) pump water from the Floridian Aquifer and/or the Savannah River. Also, in the Town of Hilton Head Island several public service districts provide service. BJWSA serves the faster-growing areas of the LEDD and is meeting current and projected service needs.   LRWS is a joint municipal system that serves the majority of the Hampton County municipalities with the exception of the Towns of Estill and Scotia.

Increasing demands on the supply and more stringent regulation of the quality of water has stimulated efforts by public officials all along the eastern seaboard to access new water sources. Some communities in the Lowcountry are concerned about their water supplies largely because of new EPA regulations for water quality, increasing demands on the supply, and recent evidence of salt-water intrusion in some existing wells. Hilton Head Island has decided to reduce its dependence on water from the aquifer by accessing the Savannah River for a new source of water. This can be problematic between South Carolina and Georgia because there are limits to how much water can be pulled from the Savannah River and not damage the ecology of the river.

Generally, increasing demand and diminishing supply, coupled with more sophisticated water-quality testing is increasing the cost of water along the coast. In most rural areas, households depend on private wells, wherein the quality of water is largely untested and not known.

There is no data immediately available on the percentage of households that employ septic tank disposal of waste effluent versus a sewerage system. However, most homes in the unincorporated areas and portions of the incorporated areas use a septic tank. Municipal and smaller privately owned wastewater systems are found predominantly within incorporated areas and in many of the "closed-gate" residential developments.

Public water systems serve all the incorporated communities in the Lowcountry and portions of unincorporated areas immediately outside them. BJWSA is the primary service provider for Beaufort County and Jasper County, with the exception being the Town of Ridgeland. The Lowcountry Regional Water System (LWRS) serves municipalities in Hampton County. This only leaves Colleton County without a regional water and wastewater provider. Wastewater service is present only in and around the larger, more developed areas. These include the City of Beaufort, Town of Bluffton, Town of Hilton Head Island, portions of unincorporated Beaufort County, City of Walterboro, Town of Brunson, Town of Estill, Town of Gifford, Town of Hampton, Town of Varnville, Town of Yemassee, City of Hardeeville and the Town of Ridgeland.

The disposal of municipal solid waste is governed by SC Department of Health & Environmental Control (SCDHEC). Localities are required to submit plans every five years regarding their methods of waste disposal and recycling. Beaufort and Jasper Counties currently dispose of their waste at the Hickory Hill landfill in the east central section of Jasper County. Colleton and Hampton Counties each have a county owned landfill and dispose of their waste there.

The amount of pounds of waste generated per person per day varies widely between Beaufort County and the other three counties. Beaufort County's average is approximately twice that of the other counties, which represents waste from the transient population of a coastal, tourism-oriented county.

Housing. The percentage increase of housing units in the Lowcountry surpassed the rate of population growth in the 1990's and 2000's *(See Table XII).* In Beaufort County and Jasper County, the number of housing units increased by over 30 percent between 1990 and 2000 and at a time when the population in the counties increased by 39.9 percent and 33.5 percent. Our population was growing faster than the housing stock. Colleton County's and Hampton County's experience was similar in that their population growth was not outrunning their housing stock in 2000.

TABLE XII: ***Total Number of Housing Units: 1990, 2000, 2010 and 2015***

	1990	2000	% Change 1990 to 2000	2010	% Change 2000 to 2010	2010	% Change 2010 to 2015
Beaufort	45,981	60,509	31.6	93,023	53.7	93,858	0.9
Colleton	14,926	18,129	21.5	19,901	9.8	19,749	-0.8
Hampton	7,058	8,582	21.6	9,140	6.5	9,058	-0.9
Jasper	6,070	7,928	30.6	10,299	29.9	10,729	4.2
South Carolina	1,424,155	1,753,670	23.1	2,137,683	21.9	2,174,319	1.7

Source: US Census

New housing construction has slowed overall relative to the percentage change in population. Across the Lowcountry Region as a whole, the population increased faster than the available housing units did. Beaufort County had a net increase of 32,514 housing units, while its population increased by 41,296 persons. Colleton County had a net increase of 1,772 housing units while its population increased by 628 persons. Hampton County had a net increase of 558 housing units while its population decreased by 296 persons. Jasper County's increase in housing units was 2,371 while the population increased by 4,099 persons. The need for affordable housing and work force housing is important in the LEDD.

Educational Facilities. There are sixty (60) public schools in the region with a total enrollment estimated at 34,117 students. All counties, but Hampton County have one county-wide school district. Hampton County is divided into two districts, Hampton I and II.

There are twenty-five (25) private schools in the region with a total enrollment estimated at 4,321 students. Each county has at least one private school. Beaufort County has six non-parochial schools with K-12 and seven parochial schools throughout the county. Colleton, Hampton and Jasper Counties each have one non-parochial school (K-12).

The Lowcountry has a two-year technical college, the Technical College of the Lowcountry (TCL). The main campus is located in the City of Beaufort, with a satellite branches in Southern Beaufort and Jasper County, Colleton County and the Town of Varnville. TCL offers Associate Degree programs in the Arts, Science, Civil Engineering Technology, Computer Technology, Criminal Justice Technology, Early Care and Education, General Business (GB), General Technology, Industrial Technology, Nursing (AND), Office Systems Technology, Legal Assistant/Paralegal, Physical Therapist Assistant, and Radiologic Technology. There are also other diploma programs and numerous other certificate programs tailored to the local economy are offered.

There are two branches of the University of South Carolina in the Lowcountry. The USC-Beaufort, is a four-year college with Associate degree programs in Science and Arts. Also, a Bachelors degree can be obtained in Nursing, Interdisciplinary Studies, Early Childhood Education and Business Management. USC Beaufort has two campuses – a north campus located in the City of Beaufort and a south campus (New

River) located in Southern Beaufort County. The USC-Salkehatchie branch campus, located in the City of Walterboro is a two-year college, which offers Associate Degrees in Arts and Science.

The Academy for Career Excellence provides vocational training for Beaufort and Jasper Counties. The Thunderbolt Career & Technology Center is the primary provider of vocational training in Colleton County.

Medical Facilities. Within the LEDD, five hospitals are available to the public, as well as major trauma centers in Charleston and Savannah. In addition, the US Naval Hospital in Port Royal provides medical service to active and retired military personnel.

Beaufort County has three hospitals, one in the City of Beaufort, the Navy Hospital in Port Royal and one in the Town of Hilton Head Island. Colleton, Hampton and Jasper County each have one hospital.

Cultural and Recreational Opportunities. The southern area of South Carolina was one of the first areas to be explored and settled in North America. In 1521, less than 30 years after Columbus discovered America, Francisco Gordillo landed among the Lowcountry's sea islands and named the area Santa Elena. Since that time, successive generations have left a rich cultural heritage, which lives on in the numerous churches, houses, barns, forts, and plantations.

The City of Beaufort has a 304 acre Historic District that was designated a National Historic Landmark on July 7, 1973. The district offers a museum and other historically significant buildings dating back to 1717. In nearby areas within Beaufort County, there are remnants of structures that date back to the 16th century and intact structures from the 17th and 18th centuries.

The historically significant buildings that can be found in Colleton, Hampton and Jasper Counties are from the 18th and 19th centuries. The City of Walterboro has two historic districts. Many buildings were destroyed during the Civil War.

Four state parks dot the Lowcountry, two in Colleton County, one each in Hampton, and Beaufort Counties. All offer cabins and/or campsites, picnic areas, swimming, fishing and hiking. Beaches are easily accessible at Edisto Beach State Park and Hunting Island State Park.

Nature preserves and wildlife refuges are an integral part of the Lowcountry environment. Ten sites offer nature trails and exhibits for a special look at wildlife management. These site/projects include the ACE Basin, a protected wildlife habitat covering 350,000 acres in a tidewater region of Colleton County. Historic rice fields, managed wetlands, pristine coastal waters, extensive swamps and marshlands, and large blocks of forest land have made the ACE Basin one of the most important wildlife habitat areas in North America. Also included is the Great Swamp Sanctuary an 842 acre tract with nature trails that contains the headwaters of the Ashepoo River.

Fishing, hunting and boating are three of the most avidly-pursued activities in the Lowcountry. Many hunters from out-of-state now lease properties on which to hunt.

The Lowcountry, particularly Hilton Head Island, has a wide selection of outstanding resorts that offer golf, tennis, dining, entertainment and shopping facilities. The area is home to many fine artists and artisans. Art galleries are prevalent, and each year several arts and craft festivals attract many thousands of people. The SC Artisan's Center located in Walterboro is the State's official fine crafts center.

9.   Planning and Economic Development Activities

Economic Development Activities. LCOG has played an active role in the four-county region furthering economic development, creating job opportunities for low-to-moderate income persons and decreasing the underemployment rate. LCOG has done so through the administration of community and economic development grants. A cooperative relationship exists with our member governments, county economic development boards and alliances, and the private sector. LCOG serves as an auxiliary support to the regional alliance group that is now serving all member counties of the LEDD. Southern Carolina Alliance (SCA) is the key marketing and prospect and product development arm of the LEDD. LCOG prepared an Economic Diversification Study that identifies the cluster areas our development officials need to focus marketing and recruitment efforts. LCOG provides technical assistance, especially in the areas of grants development and financial packaging. These projects illustrate LCOG's commitment to intergovernmental cooperation as a means of bringing about economic development. (Please see Appendix D for a list of recently awarded grants in the LEDD.)

Planning Activities. LCOG has increased its involvement in area-wide planning issues. The staff is using its professional resources to provide local governments with reports, statistics and information on land use and prepares zoning ordinances, comprehensive plans, and other planning assistance related to economic development. The Planning Department is under contract to SCDOT to be the regional transportation planners for the Lowcountry. As a result, the department has recently completed a Long Range Multimodal Regional Transportation and a Business Plan for a fixed-route bus system (in conjunction with the Lowcountry Regional Transportation Authority) and is currently working with a consultant, SCDOT and regional social service agencies on a Transportation Coordination Plan.

Active planning departments with full-time professional staff in the Lowcountry, are limited to Beaufort County, City of Beaufort, the Town of Bluffton, the Town of Hilton Head Island, the Town of Port Royal, Colleton County, Jasper County, Town of Ridgeland and the City of Hardeeville.

Most of the local governments in the region are currently updating comprehensive plans that were originally developed to meet the 1999 State mandated deadline. For example, Beaufort County is undertaking an extensive comprehensive planning process as is the City of Walterboro and the Town of Ridgeland. Jasper County has just completed its plan and Hampton County is undertaking a joint county-municipal process. In addition, the City of Beaufort, Port Royal, Yemassee, Hardeeville, and the Town of Hampton have just begun their comprehensive plan update processes.

Workforce Development activities.   The Lowcountry Council of Governments has a crucial role in design and implementation of workforce development activities as prescribed under the   Workforce Investment Act (WIA) of 1998. This is being accomplished through three major activities that include the administration and supervision of one-stop centers, a youth program and the LEDD's workforce development program.

Currently, the Lowcountry Workforce Investment Area (LWIA) has four mobile teams that serve the LEDD. The one-stops provide three levels of service for job seekers – universal access to information on employment opportunities and training opportunities, intensive programs in which case workers can assist job seekers in becoming self-sufficient, and training opportunities for dislocated workers.

The LWIA also manages a youth program that is designed to serve youth aged 14 to 21 with the goal of preparing them for the workforce. This is accomplished by working to increase graduation rates and credential rates (GED), and to improve the participants' basic skills, occupational skills, and job readiness

skills.   The LCOG workforce program is an important part of the LEDD's comprehensive economic development strategy to increase investment and create new jobs paying above the state average wage.

IV.   ECONOMIC ASSESSMENT

The Lowcountry Region is diverse in terms of land use, economies, natural and cultural resources, worker skills and income. Diversification can be a positive force and is an important economic development goal. The diversity that exists in the Lowcountry Region can offer potential employers a range of workers for jobs ranging from low-skilled service sector jobs to high skilled, high tech jobs.

Social and economic characteristics in the Lowcountry district are sufficiently different that the four counties essentially play on different fields. This presents some challenges in forging a regional partnership in economic development and otherwise. This section offers an understanding of each county's assets and liabilities as it pertains to economic development.

The proximity to Charleston and Savannah and access to the interstate system and rail are potential assets to all the counties of the Lowcountry district. Many people are attracted to these larger markets and some take advantage of the opportunity to explore cultural sites, or experience the abundant scenic beauty or attend the many festivals and events held each year in the region.

Beaufort County. Beaufort County contains the largest amount of economic activity in the LEDD. The county is the most affluent of the four and has the strongest economic base. With 30 miles of Atlantic Ocean coastline and a myriad of sea islands and waterways, Beaufort County has been a natural magnet to tourists and retirees. During the 1960's, Beaufort County was one of the poorest areas in the state, but today Beaufort County has become one of the most prosperous counties, largely because of development in Southern Beaufort County, beginning with Hilton Head Island, but now more so in Bluffton and along the SC 170 Corridor and to a greater extent along the US 278 corridor which connects the area to I95 and serves in part as a border for Beaufort and Jasper counties.

Traditionally, residents in Beaufort County have lived in an agrarian and aquatic society.   Today, Beaufort County's economy is influenced by the retail and service sectors which are fueled by tourists, retirees and the military.   The tourism industry relies almost exclusively on disposable income so Beaufort County's economy is usually related to the health of the nation's economy.

Job creation is occurring, but many of the new jobs are in the service sector and are directly or indirectly in response to growth in the tourism and retirement industry. Resort (waiters, maids and cooks) and other tourism-related jobs are lower paying and generally have no fringe benefits, most importantly health insurance. Since tourism is seasonal, workers are not employed in full-time year-round positions. Thus, while the area may have low unemployment rates, the amount of underemployment remains high.   Efforts are being made to diversify especially by focusing on attracting technology-based companies and jobs. However with those types of industries there comes a need to train an existing workforce that has traditionally been focused on jobs that are not as technologically advanced.

Housing costs are higher in Beaufort County relative to surrounding counties. Land values are higher which translates into higher assessed values and property taxes. This has placed an additional hardship on those property owners, specifically the life-long residents who are working in low paying or minimum

wage jobs. Higher housing costs are forcing many younger workers to live farther from their jobs where costs are more affordable.

Though housing and living costs are higher than surrounding counties, relative to the nation as a whole, Beaufort County would be categorized as affordable. Residential and commercial development properties are readily available at comparatively lower cost than what is found in many urban or highly developed sections of the country.   The Port of Port Royal was closed by the State of South Carolina. This mandated closure is giving Port Royal is the opportunity to re-develop the port property.

One anchor to Beaufort County's economy is the military. A good neighbor and an invaluable asset to the community for over fifty years, the Military Tri-Command, consisting of the Marine Corps Air Station (MCAS), Parris Island Training Depot, and the Beaufort Naval Hospital, presently has a military population of approximately 10,087. There are 1,329 Department of Defense civilian employees.   These numbers do not include veterans and retirees who have located in the region. The labor income generated from the bases total $1 billion. The annual economic impact for the region is $2.3 billion. There is no single greater influence on the local economy than the military and its loss would be difficult to overcome.[2]

Colleton County. Colleton County is adjacent to Dorchester and Charleston Counties, two of the fastest growing counties in the state. Summerville in Dorchester County and Charleston are popular destinations for the residents of Colleton County. Often Colleton County residents spend their discretionary dollars outside the county, which has placed a strain on local retailers and service providers. Also, roughly a thousand persons, or one in ten of the total working population in Colleton County, work in Charleston or Dorchester Counties.

Colleton County has five exits along Interstate 95, the main north-south corridor along the East Coast. Many businesses have prospered from Interstate travelers. Highway 17, the main corridor of traffic between Charleston and areas to the south, passes through the southern portion of the county. However, a very limited number of commercial establishments are located along Highway 17 within Colleton County. Much of the land along this corridor within the county is not available for development because it is part of the ACE Basin.

The ACE Basin lies between the Ashepoo, Combahee and Edisto Rivers in the southeastern part of Colleton County. The Edisto and Combahee Rivers are the northern and southern county lines. The land is owned by private landowners, public agencies and non-profit organizations to be protected in perpetuity. This 350,000 acre wildlife preserve is destined to become a national treasure and an eco-tourism plus for the county.

Edisto Beach, a small town of summer homes, lies in the lower part of Colleton County and is the only portion of the county that adjoins the Atlantic Ocean. Visitors can camp at the state park and use the marine facilities. Edisto Beach remains a destination for persons seeking a quiet family-oriented place to vacation or live.

The City of Walterboro, the county seat, is the largest incorporated area of the county and the main center of commerce. Walterboro continues to dominate the issues of the county because of its size and political base. Businesses in Walterboro have been successful attracting persons from neighboring Hampton County and outlying areas outside of the LEDD. Many residents at the western end of the County travel to

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[2] 2017 Economic Impact of SC's Military Community.

Walterboro for their basic shopping. In addition to a Wal-Mart Supercenter and an expanded department store (Belks), the city has other attractions that include a cinema, restaurants and medical facilities which include a newly constructed Veterans Administration nursing home that is managed privately. Moreover, Walterboro is gaining a reputation as an antiques shopping destination.

Just outside the City of Walterboro is the Lowcountry Regional Air Park, an excellent park with paved roads and utilities. The park has several moderate to small sized buildings and large sites. Despite the park's age there is room for expansion. Lack of an educated and trained work force has made it difficult to meet the full potential of the industrial park. The Lowcountry Regional Airport is also located adjacent to this industrial park. With three runways in excess of 5,000 feet, the airport is unique for a community of its size because the airport can accommodate all but the largest jet aircraft. The airport's main runway (6,000ft) will have an ILS (instrument landing system) by early 2008.

Colleton County has also developed the Colleton Commerce Center which is a 260 acre park located on one of the northern I95 exits in the County. Recruitment for this park has focused on distribution and logistics and would tie to the existing industrial area through the establishment of a foreign trade zone. Colleton is starting to experience greater prospect traffic that is migrating from the greater Charleston area with companies that supply certain cluster industries such as the avionics industry.

Hampton County. Hampton County has undergone fewer changes than her faster growing neighbors over the past twenty years; the size of its population and civilian labor force remains about the same. Lack of economic growth has resulted in a relatively low cost of living, low median household income and higher unemployment rate. Relative to the state and the nation, the population is poorly educated and lacks a trained labor pool.

The Lowcountry Regional Industrial Park (LRIP) is a 1,200-acre regional industrial park located eight miles off Interstate-95 between Yemassee and Hampton/Varnville. The five counties cooperating in promoting the park were successful in attracting two local business expansions as well as a new business. The fact that the park is regional allows the attraction of moderate-to-large employers by offering the most favorable Targeted Jobs' Tax Credit Program in the State. The park also has the added benefit of being located in a Foreign Trade Zone that provides advantages to companies that conduct foreign trade as part of their business. Property taxes paid by businesses that operate in the park are divided evenly among the five counties. In addition to the LRIP, the Towns of Estill, Hampton, Varnville, and Yemassee each have smaller parks that have varying amounts of available land and/or buildings. Hampton County also is the only county in the LEDD that has partnered with a regional alliance – the Southern Carolina Alliance- to market the county.

Hampton County's primary assets are access to federal and state government grants programs, location on I-95, low cost of living, affordable land, and proximity to two major southeastern cities and their ports. The county's work force, its rural nature (lack of amenities and limited choices of goods and services), and small tax base are deficits to attracting industry and creating jobs in the county. However, Hampton County has proportionately more people employed in the manufacturing sector, which in large part is due to existing industries that have made long term commitments to be in the County.

Jasper County. Historically, Jasper County has difficulty attracting residents and companies to the county despite being adjacent to the City of Savannah. Without access to developable land, little infrastructure and lack of support from the state, Jasper County has been prevented from progressing and enjoying any real growth. However, with two new industrial parks, the attraction of new industries that are housed in

these parks, and the eventuality of a large container port in Southern Jasper County on the Savannah River, Jasper County has arrived as a more significant contributor to the region's economy.

Jasper County is adjacent to Chatham County and Savannah and to the Hilton Head/Bluffton area of Beaufort County and is beginning to experience some residential overflow. This is making the need to strengthen the school system, educate and properly train the work force, and upgrade existing infrastructure an immediate need.

For years, timber companies controlled large tracts of land in Jasper County, paying a relatively small amount of property tax per acre. The inability to develop the land and the lack of a strong tax base has severely hampered the county. This is changing due to increasing land values, particularly in southern Jasper County increasing. Land that has been unavailable for development for decades is being released for this purpose by large timber interests and key families.

The county hosts a state welcome center along I-95, and a regional welcome center at Point South, which presents an excellent opportunity for Jasper County, as well as all the counties of the Lowcountry, to promote their communities and events.

The single most promising event that has occurred is the pending development of a deep water port in southern Jasper County. In addition, BJSWA has constructed water and sewer infrastructure in the Cherry Point area as well as a new water treatment plant in Purysburg, which adds to the area's attractiveness for development. SCE&G has also built a new electric plant in anticipation of increased electricity needs. Moreover, Jasper County borders Beaufort County in the rapidly growing southern portion. Spillover development is currently taking place. This development should continue as development restrictions and land costs are lower across the border from Beaufort County.

The 278 connector has opened new opportunities for development from its terminus at I-95 and the junction with SC 170. Beaufort Memorial Hospital, Hilton Head Medical Center and Memorial Medical Center have facilities in that area and the Coastal Carolina Medical Center operates at Exit 8 (the intersection of I-95 and US 278). In addition, the new Technical College of the Lowcountry Campus has opened alongside of various commercial, light industrial and residential uses planned for the land along that corridor.

Based on the State of South Carolina's Job Tax Credit Classifications for 2017, Hampton is classified as a "Tier IV" county, Colleton and Jasper are "Tier III" counties, while Beaufort County is classified as "Tier I".

V.   VISION FOR THE REGION

A.   Vision Statement

Creating, maintaining and sustaining economic development involves an integrated set of strategies that interfaces with all areas of society, including, job creation, availability of capital, job training, education, child care, affordable housing, environmental protection and social programs of all types. Three main goals or guiding principles are offered to achieve this.

B.   Goal and Objectives
Goal I: **Establish and follow a shared vision, which fully recognizes the district's strengths and weaknesses while embracing the traditions, character and environment unique to this region.**

The acceptance and recognition of a common vision can help to keep a community focused on the direction it wishes to go and forge unity among its people. A comprehensive community assessment can help to identify the traditions, character and environment that must be preserved and which make the community special to those who live there. Since it is impossible to be all things to all people, reasonable choices must be made based on an understanding of existing circumstances. The process should result in a commonly-shared view that can guide local leaders in their governance and instill confidence in the business community.

A common vision of what the region is, what it has to offer, and what it realistically can become can stimulate economic development and enhance people's lives. Since change is inevitable, the decision becomes whether change will shape the community, or will the community shape the change. Economic growth is a fundamental goal for most communities. When a community fails to grow, it gradually deteriorates. However, when growth goes unmanaged or uncontrolled, the result can be undesired or objectionable. A commonly accepted vision can define the direction that a community desires to go.

Goal II: **Promote decisions and policies made locally to be done in light of what is occurring on a national and global level.**

Think globally, act locally is a commonly espoused tenet. However, all too often, the tendency is to only think locally and not recognize that much of the economy interacts directly or indirectly globally. Communities of all sizes everywhere are entwined with and affected by world events.

Modern day communication networks have the ability to compress time and distance to the point that the exchange of verbal and written information and direction can be accomplished instantaneously. A company or its branch operation can be managed from any point in the world. The location of a company's operation can be determined by factors that have more to do with the cost of producing goods or services measured in terms of overall productivity.

Today, travel time and cost between countries is vastly improved. Often, visitors and tourists are foreigners who very naturally evaluate their experience and pass along impressions of the local people and culture. Popular travel destinations can be quickly established or, in some cases, seriously fade. The tourism industry has increasingly catered to the global market.

Most communities are evaluated on the existence of certain fundamentals; an educated and trained work force, an open and tolerant society, low crime, high family values and pride of ownership will attract more development opportunities, foreign or national. Communities that do not display these basic attributes will not compete favorably worldwide for economic opportunities. The decisions that affect or influence change in a community when viewed from a global perspective typically are quite different than those based solely on local concerns and conditions.

Goal III: **Institute more direct lines of communication and cooperation among municipalities and their county government and between county governments within the district, for the purpose of realizing an optimum level of service provision and maximum cost efficiency.**

Americans, both rural and urban, recognize that while government may be inefficient, the political milieu makes change difficult. However, fiscal pressures on local government continue to rise and with it higher local taxes. Politicians are encountering more criticism and involvement with the issues by citizens of the

community.   The need to cut waste and increase productivity is causing local governments to consider regional approaches.

For years, opportunities for cost savings and increased efficiencies have been achieved in the private sector through economies of scale. Local governments are finding that they can solve common problems by achieving economies of scale. Opening a dialogue of cooperation for mutual gain and reducing the level and extent of bureaucracy should be practiced.

VI.   OBJECTIVES

The following proposed objectives adhere to the foregoing regional goals while more clearly delineating steps that should be taken to achieve economic growth in the region. These objectives are of a duration that is both meaningful and realistic. Though at times objectives should be prioritized, it is suggested that a concerted effort be made to meet all the objectives.

- Continue to organize forums and workshops that will explore programs, strategies and projects that can be pursued for the mutual benefit of the region including the establishment of a regional economic development alliance.   The Lowcountry Council of Governments can be instrumental in the organization of the conferences. Discoveries and decisions formed as the result of the conferences would be recorded and included in the Comprehensive Economic Development Strategy.

- Attempt to integrate each County and local government's comprehensive plan to the greatest extent possible. Each county has undergone, or is in the process of updating their comprehensive plans. As the region's economy becomes more interrelated, it is incumbent upon each local government to cooperate with its neighbor. This will encourage and enhance the development of the shared vision.

- Assist in strengthening the local economy through the support of affordable housing efforts in the region. There continues to be a lack of available workforce housing which ultimately weakens the local economy because many of our workers do not live in or near the communities they work in.

- Assist in securing public support for continuing improvement of education in the public schools, strengthening the region's higher learning facilities, and increasing opportunities for the working public to increase their job skills. The level of educational attainment evidenced in a community's labor pool is commonly assessed by a prospective business. Or from another viewpoint, educational attainment, labor skills and job experience determine the jobs for which a person can qualify. For the region to enjoy economic prosperity, diversity and growth, the region must support the educational enrichment and job skills enhancement of all its citizens.

- Institute programs that acknowledge and reward community involvement and participation. Getting people involved is difficult. Individuals often feel that their voice or contribution is not recognized. Volunteer awards, public awareness campaigns, leadership programs and voter registration drives are some examples of ways to improve community involvement. The more people who take an interest and pride in their community, the greater the likelihood of achieving meaningful and lasting improvements.

VII.   ACTION PLAN

A.   Program and Project Selection

Beaufort, Colleton, Hampton and Jasper Counties must continue to expand and diversify their industrial and manufacturing sectors to ensure economic prosperity. However, these sectors are subject to the economic dynamics of the world market. Industry, unlike tourism, can be established most anywhere and therefore competition to maintain and attract business is intense.

While the economies of the four counties combined are somewhat diversified, no one county is sufficiently diverse or large enough to withstand a prolonged economic slowdown or a catastrophic loss. For example, if the military base closed in Beaufort or when the region is hit by a major hurricane (as with Matthew in 2016), the road to a full recovery would be long and difficult because the overall economy is heavily reliant on the retail and service sectors. For the region to realize lasting stability, its diversity must be expanded and efforts must be made to have the infrastructure in place to foster economic relisiency. Moreover, the manufacturing sector needs to continue to grow.

In an effort to address this need for diversification, Lowcountry Council of Governments initially prepared an Economic Diversification Study that was sponsored in part by the US Department of Defense. While the purpose of the study was to identify clusters that should be pursued to help diversify the region's dependence on the presence of the military bases, it has helped the region focus on economic clusters that are best suited to our strengths. Even with this study and work done in some of the counties in the LEDD to ascertain the perceived acceptability of various industries as classified by standard industry code, it has been incumbent upon the counties to develop a marketing plan, which targets specific industries based on existing economic resources. With the expansion of Southern Carolina Alliance into all four of the LEDD counties there has been some continued successes that can be attributed to their marketing efforts. Companies that have expressed interest in the area should continue to be courted assuming that the operation is compatible with the community.

The concept of cluster development is not foreign to South Carolina as evidenced by the State's commitment to the mission and goals of New Carolina, an organization of over 50 business and government organizations committed to the "Porter Strategy" for cluster development – play to your core industry strengths, change the economic environment through business innovation and education, and streamline efforts to this end. For the state as a whole there are six areas of opportunity for cluster development identified by New Carolina that includes: automotive, biopharmaceuticals, chemical products, forest products, production technology, and textiles. For the LEDD in particular, the two primary cluster focuses recommended were "aerospace engines & vehicles" and "motorized and electronic goods" with secondary focuses on: transportation and distribution, textiles, production technology, hospitality and tourism, forest products, building and construction, chemical products, agricultural products and automotive.[3] These clusters remain significant to the LEDD region and continue to be courted.

In addition to this, an assessment should be completed which would identify how the four counties depend upon one another. Obviously, the counties are geographically connected and in close proximity to one another and thus resources in one county are accessible to the others. Understanding where and how the counties are interdependent may present new opportunities for cooperation and utilization of combined

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[3] SC Competitiveness Initiative Cluster Activation (June 2005)

resources to the good of the region as a whole. This becomes more necessary as recent catastrophic events (the floods of 2015 and Hurricane Matthew) have stretched local resources to the limit.

Obvious growth opportunities are present in the retail and service sectors because of the military, the large tourism industry and the rapidly growing retirement population in the LEDD. These opportunities do not require stimulus, but growth management plans need to be put in place to encourage the type of development that will best serve the long- term values of the counties in the region. Additionally, it has been determined through the results of the diversification study and subsequent studies that we need to focus our efforts on distribution and logistics clusters as well. With the center of the district is transected by the primary East Coast Interstate artery, the region needs to fully exploit economic opportunities that exist because of the presence of the Interstate system. With the assistance of various federal resources we currently have only four of thirteen interchanges that do not have public water and sewer access.

Close proximity to the Ports Of Charleston and Savannah, and two free trade zones is an economic advantage. Companies that are dependent on overseas trade could be potential prospects for relocation to the Lowcountry. Existing companies in the Lowcountry should be supported in their interest to expand their market overseas. A local specialist in trading overseas could be retained and readily accessible to existing and prospective businesses.

Government grants and loan programs are designed to alleviate hardships found in the more impoverished areas of the United States. High levels of poverty and underemployment have been identified in the Lowcountry. Consequently, projects that put additional low to moderate-income people to work may be eligible for some assistance.

More programs should be established that will provide the essential elements to a business' success – access to capital and qualified and professional business expertise. Other programs could be established that are tailored to the local economy.

Virtually every rural area is interested in expanding their manufacturing sector and all are offering comparable financial incentives to prospective businesses. The most recent studies done on business recruitment strongly suggests that companies are making site selections based on several factors above and beyond financial incentives. The primary factors are:

- The availability of an educated and trained work force in that particular business' field.
- Infrastructure (water, sewer, optic fiber communications and broadband).
- Moderate to low cost of living (measured in terms of housing, taxes, health care and transportation).
- Essential and discretionary social amenities (quality health care, recreational and cultural amenities).
- An excellent public school system.

From a national basis, the data indicates that LEDD measures low in these areas. In today's industrial recruitment market, the suburban areas of major metropolitan areas are competing most favorably for new and expanding businesses.

B.   Course of Action

Based on the plan's goals and objectives, the LEDD Board of Directors has formulated a list of projects for the future to best implement the Comprehensive Economic Development Strategy. As programs and projects are implemented and depending on the availability of federal and state assistance, the Board will

adjust its list of activities and projects. Economic development and industrial recruitment of businesses paying wage rates at or above the state average remains one of the region's highest priorities.

1) The LEDD will continue to work closely with Jasper County and other local and regional organizations to support the development of a port (Jasper Ocean Terminal) in the southern portion of the County. The County continues to have increased prospect activity as a result of the plans in place for the development of the port and the LEDD continues to provide development data for those prospects. The River Port project in Hardeeville is particularly important and the warehousing/distribution/logistics business sector remains a focus for the LEDD.

2) Work with Southern Carolina Alliance to further the initiatives established through the Promise Zone designation that include not only supporting efforts to bring forth their 6 near term transformational projects but also to work on long term infrastructure projects that support the goals and vision of the Promise Zone. These efforts include but are not limited to expanding broadband access throughout the LEDD, siting and constructing a state of the art forensic lab and training facility, developing technology centers, and developing improved healthcare centers that provide more specialized services in the LEDD through telemedicine.

3) The SC Hwy. 68 Corridor at I95 Exit 38 in Hampton between Yemassee and Varnville remains a focus for economic development efforts within the LEDD. The LEDD is working closely with the occupants in the Lowcountry Regional Industrial Park (LRIP) to overcome obstacles faced there. Through our Workforce Development Program actions are being taken to strengthen the area's labor force. Hampton County now has full ownership of the LRIP, and is continuing to market the park as a full member of the Southern Carolina Alliance.

4) Continued support for expansion of the Southern Carolina Industrial Campus along the SC Hwy. 68 Corridor. Currently, the park has one building that is home to two companies. Additional product and infrastructure are needed to expand opportunities at the location that include establishing a rail crossing that will create and intersection between this park and the LRIP.

5) Support of Hampton County and the Town of Yemassee's efforts to expand the Town's WWTF to a discharge limit of 1.5MGD to support the Lowcountry Regional Industrial Park, the Southern Carolina Commerce Park and the Angel tract which represents the County's industrial corridor.

6) Support of the Lowcountry Regional Water System's (LRWS) continued growth to support the economic development efforts of Hampton County and her municipalities and to add resiliency to their system in the event of natural disasters.

7) To better meet the needs of employers and increase job skills, LCOG will work to secure funding to establish technical training centers in key locations in all LEDD counties by partnering with Technical College of the Lowcountry and the Lowcountry Workforce Investment Area and focusing on development of skills training programs that support the demand of our current employers and are relevant to the employment clusters that are emerging in our region.

8) The LEDD will support projects that will increase economic resiliency in the event of natural disasters that will minimize shutdowns that have been experienced by our businesses during catastrophic weather events.

9) The LEDD will support the development of an inland port to connect the Jasper Ocean Terminal by rail to the interstate highway system, particularly I-95.

10) The LEDD recognizes the importance of having available financing & the need to continue to market and support the Title IX Revolving Loan Fund.

11) Lowcountry COG is in its third three-year term as a regional HOME consortium to support affordable housing efforts for residents of the Lowcountry. All original participants renewed for the new three year period. Twenty-four of twenty-five local governments are members.

12) Assist the City of Walterboro with securing funding for the construction of an interpretive center at the Great Swamp Sanctuary – a nature preserve dedicated to providing educational and nature-based tourism, job and investment opportunities in the LEDD.

13) Continue with the marketing of the Cypress Ridge Business & Industrial Park in Ridgeland and the construction of additional water, sewer and road infrastructure within the park to access other parcels for development. This goal will result in additional jobs in the park that have a higher wage rate and provide benefits to employees.

14) Encourage and assist with industrial and commercial development in the southern Jasper County/Hardeeville area that will result in the creation of new jobs particularly with the Hardeeville Commerce Park and the RiverPort developments.

15) Continue to work with Jasper County and the Town of Ridgeland to develop products to support commercial and industrial development in the northern part of the county.

16) Support construction efforts for a new WWTF in Ridgeland to serve new businesses locating in the Town and the publicly-owned parks the Town serves. A new WWTF is needed to generate new jobs in the Cypress Ridge Business & Industrial Park and in the I-95 corridor of northern Jasper County.

17) Continue work on the development of the four I-95 corridor interchanges within the LEDD that have no infrastructure. Encourage local governments to enact development regulations in these areas that support warehousing and distribution. This includes the development of Exit3 along I95 to support the port development along with needed improvements to the US Hwy 17 corridor.

18) Support the efforts of local governments and regional non-profits to establish small business loan pools that meet the needs of local business. This could include micro lending and/or public/private partnership initiatives to grow businesses locally.

19) Work with Colleton County officials to continue to develop/promote the Colleton Venture Park.

20) Also as a result of the recent economic downturns, there are a number of industrial buildings in the LEDD that are currently vacant as a result of closures. The LEDD will work with local and state officials to market those buildings for adaptive reuse for industries that are expanding.

21) Give high priority to transportation projects within the LEDD that support economic growth within the region, as part of the State Transportation Improvement Plan and support transportation

alternatives that support commuting options. This includes the widening of SC Hwy 68 from the interstate to the entrances of the Lowcountry Regional Industrial Park and the Southern Carolina Commerce Park.

22) Continue to develop and expand the SC Works Center System to meet the needs of employers and workers in the LEDD.

23) Continue to work with the county economic development organizations to implement recommendations of the Regional Economic Diversification Study, specifically a distribution and logistics center cluster, film studio development, and healthcare cluster.

24) Work with Colleton County officials to develop business sites directly on and/or accessible to the Lowcountry Regional Airport in Walterboro.

25) Work with Town of Port Royal and Beaufort County officials to support efforts to redevelop the property that was once the Port of Port Royal.

26) Work with the local and regional economic development organizations to support businesses developing value-added products to build upon the agriculture and wood product businesses.

27) Work with local governments and business to promote working waterfront enterprises including areas like the seafood industry and the charter industry.

28) Work with the Town of Bluffton to expand the May River Technology Park.

29) Work with the Town of Hilton Head Island on redevelopment projects that create jobs and investment.

30) Work with communities that want to expand the tourism industry in their area to include working with businesses involved in environmental tourism, heritage tourism and activities that support the Preserve America initiatives.

Though a directed program is preferred over random activities, the LCOG Board supports all economic development efforts that provide job opportunities increases the level of personal income and working wage rates and expand the tax base of communities. In response to LMI job commitments made by employers, water and sewer projects are developed. Few communities can proactively undertake water and sewer service projects thinking that if they build it, they will come. The needs are out there but the funding is not. Every opportunity to expand or improve a water and sewer system will be pursued with CDBG or EDA funds if possible.

The Lowcountry Council of Governments will continue to offer planning and technical assistance to local governments. Efforts will be made to assist in areas other than economic development including environmental protection, housing, aging, transportation, community development, coastal zone management, solid waste management and social programs. A coordinated effort at the regional level can be facilitated by LCOG, which has the expertise and knowledge to access available federal and state resources.

VIII.   EVALUATION

Successfully implementing a Comprehensive Economic Development Strategy requires all sectors of the community: government, education, private enterprise, social services, health, trade and professional organizations, chambers and economic development boards engaged in a shared vision of what the community can and should become. It is less difficult to undertake projects and programs when there is a consensus of action and thought. Piecemeal implementation of projects and programs invites unproductive endeavors. Coordination of activities can amplify all undertakings and ensure immediate and sustainable economic progress. An evaluation system can be established which will keep the region informed of its rate of progress.

An established successful way to track the progress of a community or region is through a quality of life survey. The survey can be designed to provide information and insight into the many areas of the community which have been targeted for improvement. The survey would measure criteria typically not found researching available data and statistics. Improvements in the external environments of the region are measured by periodically surveying the following areas: the economy, public safety, health, education, natural environment, mobility, government/politics, social environment and culture/recreation. These surveys are conducted annually and comparisons over time could be made to measure progress. In essence, this would be a report card for those in the community and those considering relocation to the community.

Several benchmarks can be used to determine the effectiveness of the LEDD in addressing area distress. Six important areas measure how successful the LEDD is in generating job opportunities and creating wealth in the region. Those benchmarks are reviewing progress in reducing the unemployment rate of the counties, increasing per capita income of the residents of the region, increasing the average weekly wage rate of the counties, increasing the skills of the workforce, comparing the annual GPRA Data collected against the local developers' performance goals for their communities.

With regard to unemployment, the goal is for all member counties' unemployment rates to be below the State average. This goal has for the most part been met but underemployment remains a particular concern.

With regard to per capita income, we are seeing downward trends in our member counties. We would like to see these percentages increase consistently so that all LEDD counties have per capita income figures at or above the per capita income for all non-metropolitan areas of South Carolina ($24,604, based on 2015 ACS estimates).

In the area of average weekly wage rates in the LEDD, the rates on a county basis have consistently lagged behind the State as a whole. A primary goal of the LEDD remains to see average weekly wage rates increase to the State average or above. The gap between the County wages and the State average is continuing to be narrowed particularly in Beaufort and Jasper Counties where some sectors are actually above the State average but the region as a whole continues to lag behind.

In the area of increasing workforce skills, the LEDD has been successful in providing services to give people opportunities to increase their skill levels to be successful in the work environment. A primary goal of workforce development in the LEDD remains to provide services to all.

APPENDIX

TABLE OF APPENDICES

APPENDIX A

LOWCOUNTRY COUNCIL OF GOVERNMENTS BOARD OF DIRECTORS

NAME	OCCUPATION	APPOINTING JURISDICTION
BEAUFORT COUNTY		
Michael Covert	Businessman	Beaufort County Council
Phil Cromer	Retired Civil Service	Beaufort City Council
Gerald Dawson	Retired Civil Service	Beaufort County Council
Brian Flewelling (**Secretary)**	Businessman	Beaufort County Council
Herbert Glaze	School Administration	Beaufort County Council
York Glover	Retired Civil Service	Beaufort County Council
Marc Grant	Businessman	Hilton Head Town Council
Mary Beth Heyward	Health Services Administration	Port Royal Town Council
Alice Howard	Retired Civil Service	Beaufort County Council
Joseph McDomick	Retired Magistrate	Beaufort County Council
Dan Wood	Retired Civil Service	Bluffton Town Council
COLLETON COUNTY		
Esther Black	Retired Educator	Colleton County Council
Bobby Bonds (**Vice Chair**)	Attorney	Walterboro City Council
Joseph Flowers	Physician	Colleton County Council
Thomas Mann	Consultant	Colleton County Council
Crawford Moore		Edisto Beach Town Council
Evon Robinson	Minister	Colleton County Council
Gene Whetsell	Registered Land Surveyor	Colleton County Council
Tim Grimsley	Retired	Town of Cottageville
HAMPTON COUNTY		
Vacancy		Estill Town Council
James Hagood (**Treasurer**)	Retired Union Representative	Hampton County Council
Travis Mixson	Retired	Hampton Town Council
Charles Phillips	Educator	Hampton County Council
Ronald Mixson	Retired Law Enforcement	Hampton County Council
Nat Shaffer	Real Estate Broker	Varnville Town Council
JASPER COUNTY		
John Carroll	Municipal Judge	Hardeeville City Council
Tom Johnson (**Chair**)	Attorney	Jasper County Council
Henry Lawton Sr.	Retired Educator	Jasper County Council
Joey Malphrus	Retired Attorney	Ridgeland Town Council
Gwen Johnson Smith	Retired Educator	Jasper County Council

APPENDIX B

LOWCOUNTRY INDUSTRIAL AND MANUFACTURING COMPANIES

Company Name	Product	# Employees
Hampton County		
ADM	Soybean & other grains processing	8
American Machining & Mfg. Co.	Machining Tool & Die making	9
Coastal Technologies	Mist eliminators	18
Composite Materials Technology	Fiberglass flag & Lighting poles	41
Company Two	Fire Apparatus	10
Cypress Creek Renewables	Solar Farm	
Ecogy Biofuels	Biofuel	2
Elliot Sawmilling Co.	Lumber	186
Hoo Cum Mechanical Contractors	Steel Fabrication	4
KCB Services, Inc	Wood Pallet Manufacturing	7
Kapstone	Wood Chips	13
LeCreuset of America	Distribution Ctr. Cast Iron cookware	174
McCrary's Inc.	Proto-type steel millwright	8
Megco Services	Cotton gin & cypress mulch	20
Nupi America	Pipe Fabrication & distribution	37
Oakwood Products, Inc.	Manufacture chemicals for research	43
Precision Machined Components	Precision machined components	16
Progressive Packaging	Corrugated box distribution	2
R&L Carriers	Transportation	51
Smiley Electrical Contractors	Electrical maintenance	7
Southern Current	Solar Farm	
Southern Metal Works, Inc.	Metal Works	18
Southern Millwright & Supply	Welding, repairs fabrication	9
Spencer Industries	Vacuum & pressure form plastic	23
Triangle Ice Company	Ice Manufacturing	4
Wiggins Concrete Co.	Ready Mixed Concrete	8
JR Wilson Construction	Grading/Paving/Storm Drainage	42
Colleton County		
American Body Building Products	Sports drink bottler	30
American Peat & Organic Corp.	Potting Soil	10
Balchem Corp.	Water Treatment chemical co.	18
BMK Warehouse Distributors	Tire lead weights	6
Carolina Textile Recycling	Recycles used clothing	35
Carolina Visuals	Manufactures flags and banners	140
Coastal Electric Cooperative	Communications, utility ,gas	40
Colleton Medical Center	Healthcare provider	423
Colleton Software Associates	Software Materials	15
Colleton Tile & Concrete	Ready mix concrete & Septic tanks	8
Crescent Dairy Beverages LLC	Ultra pasteurized beverages	65
East Coast Pole and Timber	Debarks, grades & sorts timber poles	5
Floralife Inc.	Floral forms	60
IFCO Systems	Wooden Pallets	47

ITW Trimark	Industrial labels	25
J&L Wire	Galvanized wire decking and sheeting	18
Jaxco Industries	Fundraising products	30
JGBR	High precision steel balls & ball bearings	9
K&M Tire	Distributions	5
Marketing Services International		2
McPherson Manufacturing	Seals, gasket sets, dye cutting, custom packaging	10
Meter Bearings Group		8
Palmetto Rural Telephone Cooperative	Communication, telecom services	50
Paper Converters	Paper goods	9
Pioneer Boats	Boats	10
Pretium Packaging	Plastic Bottles	10
WNI Print Division - Press Printing	Commercial Printing	15
Rockford Manufacturing Ltd.	Metal Buildings	100
SaraFlex	Yarn and sewing thread	115
Simmons Irrigation Supply	Dist. Golf course irrigation sys.	45
SCE&G	Utility-Electricity & Gas supplier	100
Triarco Industries	Natural source raw materials for food industry	5

Jasper County

AGM Imports	HQ, distribution of natural Stone	9
Apac- Southeast, Inc.	Asphalt Production	5
Armor Building Solutions	Storm/Security Shutters	16
AS/R Systems Inc	Rebuilt & customized carousels	6
Be Green Packaging	Compostable & recyclable packaging	75
Beverly Processing Inc	Poultry	35
Brown Campbell	Steel Grating Fabrication	9
Bulk Bag Depot	Remanufacture of bulk bags	7
Caraustar	Bale, Shred and Export Waste	30
Capital Materials of Savannah Inc	Warehousing distribution of building materials	12
Carolina Castings Corp.	Castings, iron, steel, ductile	17
Carolina Slings, Inc.	Web Slings	4
Carolina Timber	Logging	12
Cleland Site Prep Inc.	Site Preparation, Clearing, Demolition	180
Conrad Yeldington Distribution Inc	Rail Operations	10
Crosby Logging and Timber	Logging	7
D.M.W. Marble &Terrazzo ,INC.	Marble, Granite, Oyserstone, Vero stone	7
Distinctive Granite and Marble	Granite and marble Countertops	5
Fred Gretsch Enterprises	Banjos, drums, guitars	10
Georgia Pacific Corp/TICO Manufacturing	Terminal Tractors & equipment	145
Hilton Head Cookie Company LTD.	Dough Refrigerated	4
John White Logging	Logging	19
KBRS	Custom Shower & Tileable	30

	Components	
Lane Construction	Asphalt Production	15
Lowcountry Biomass	Wood pellets	15
Lowcountry Paver	Paver Concrete Bricks	15
Lowcountry Concrete	Ready mix concrete, block, precast concrete septic tanks	5
Lowcountry Louver Manufacturing	Gable- End Vents, Foundation Vents	2
Lucky Dog Cuisine	Packaged meals for dogs	6
Malphrus Construction	Utilities Construction	100
Master Steel	Steel Fabrication	11
Nimmer Turf & Tree Farm	Turf grass	50
Ocean Catamarans	Catamarans	5
Ohio Gratings,Inc.	Steel and Aluminum Grating	6
Oliver Kitchens and Baths`	Cabinetry	15
Opta Minerals	Abrasive Cleaning Mineral	8
Peacock Collision Center	Auto remanufacturing and conditioning	25
Quality Beverage	Cheerwine Distribution	29
RCL Bruco	Warehousing rail supplies	6
REA Construction	Hot mix asphalt for paving	4
Renaissance Fine Chocolates	Gourmet Chocolates	4
SCE&G Jasper Generating Station	Electricity	40
Sandhill Logging	Logging	11
Setting Tools Inc	Riveting tools	8
Shaw Manufacturing's Wrought Iron Works	Steel and Alum rails	35
Smith Logging, Inc.	Logging	15
Southeast Rails and Screens	Fabrication of Rails and Gates	10
Sterling Architectural Millwork	Custom Cabinets and Doors	16
The Sun Times	Newspapers, advertising	4
Timber Products, Inc.	Logging	11
Vulcan Materials	Stone, Aggregates	4
Walsh Fabrication	Solid Surface Countertops and Granite stone	67
Wildcat Steel	Steel Fabrication	14
Wood Tech Cabinets	Commercial & residential custom cabinets, aircraft cabinets	4
Beaufort County		
Alper Dispersions	Water based color	22
Athena Corporation	Bathtubs, whirlpools and countertops	30
Atlantic Littleneck Clam Farms	Littleneck Clams	93
BB Enterprises Inc.	Wood Cabinets and Fixtures	2
Beaufort Concrete	Concrete	11
Beaufort Gazette	Newspapers	82
Beaufort Molded Products	Plastic injection molding	30
Beaufort Nail Co.	Threaded and specialty nails	30
Bluffton Oyster Co.	Oyster Dist.	35
Broad River Apparel	Lady's T-shirts	38
Brown's Fabrication & Welding	Guard rails, general welding	2
The Chocolate Tree	Candy	8

Coca-Cola Bottling Co.	Soft drink distributor	41
Coastal Concrete	Ready mix concrete	18
Curry Copy Center	Printing	9
Environments	Children's' furniture, toys	85
Ebbtide & Associates	Residential lighting fixtures, home furnishings	24
Golfer's Guide, Inc.	Periodical, publishing, printing	5
Graphics Corp	Signs & displays	6
Greenwave Biotech	Bioremediation	20
Guidera Publishing Corp.	Newsletters, books	14
Thomas J. Hampson Fine Woodworking	Fine wood furniture, Cabinets	3
Harris Pillow Supply	Pillow ticking, renovating	12
Hilton Head Ice Cream	Ice Cream, frozen deserts	15
Hilton Head Signs	Wooden Signs, banners	4
The Island Packet	Newspapers	63
The Island Printer	Commercial Printing	2
Jeter Construction Co.	Asphalt Mix	45
Kigre, Inc.	Laser Components	49
Labs, Inc	Animal Breeding	60
Lobeco Products	Chemicals	85
Lowcountry Guild	Doormats, coaster, notebooks, and placemats	25
Lowcountry Mfg.	Children's clothing	175
Lowen Co.	Real estate signs	8
Minuteman Press	Commercial Printing	6
Minster Machine	Ancillary equipment for stamping, forming presses, material handling equipment, automation equipment	75
Mister Label	Pressure Sensitive labels	18
Optimum Resource	Educational Software	40
Parker Abex	Aircraft flight, engine controls, components	230
Perry Printing	Commercial Printing	15
Pixie Products	Decorative waste baskets, canes, notebook covers	7
Procyon	tapping machines	2
Recon Mfg.	Cabinetry	4
Resort Svcs.	Processing hospital linens, mfg. Linens	240
Signsystems Southeast	Signs & displays	4
Teardrop Putter	Putter production and assembly	10
Therafirm Support Hoisery	Support Hosiery	9
2 Stroke International	Small engines	50
US Telecom Holdings	Product Billing & Customer Care Software	65
Vanguard Plastics	Polybutylene pipe, fittings	50
Visions Productions	Promotional Videos	6
Wee Bee Enterprises	Pultrusions	6
Williams Woodworking	Custom Cabinets, fixtures & furniture	7

APPENDIX C

TABLE II: *Municipal Governments*

	Form of Government	Number of Council Members	Term	Election method
BEAUFORT COUNTY				
City of Beaufort	Council Manager	5	4	Non-partisan at large
Town of Port Royal	Council Manager	5	4	Non-partisan at large
Town of Bluffton	Council Manager	5	4	Non-partisan at large
Town of Hilton Head	Council Manager	7	4	Non-partisan one member from each ward
COLLETON COUNTY				
Town of Cottageville	Mayor Council	5	4	Non-partisan at large
Town of Edisto Beach	Mayor Council	4	4	Non-partisan at large
Town of Lodge	Mayor Council	5	2	Non-partisan at large
Town of Smoaks	Mayor Council	5	2	Non-partisan at large
City of Walterboro	Council Manager	7	4	Partisan at-large
Town of Williams	Mayor Council	5	2	Non-partisan at large
HAMPTON COUNTY				
Town of Brunson	Mayor Council	5	4	Non-partisan at large
Town of Estill	Council	5	4	Non-partisan at large
Town of Furman	Council	5	2	Non-partisan at large
Town of Gifford	Mayor Council	5	4	Non-partisan at large
Town of Hampton	Mayor Council	5	4	Non-partisan at large
Town of Luray	Mayor Council	5	4	Non-partisan at large
Town of Scotia	Mayor Council	4	4	Non-partisan at large
Town of Varnville	Mayor Council	7	4	Non-partisan at large
Town of Yemassee	Mayor Council	4	4	Non-partisan at large
JASPER COUNTY				
Town of Hardeeville	Council Manager	5	4	Non-partisan at large
Town of Ridgeland	Council	5	4	Non-partisan at large

APPENDIX D

COMMUNITY AND ECONOMIC DEVELOPMENT PROJECTS					
COUNTY	*APPLICANT AGENCY*	*PROJECT DESCRIPTION*	*SOURCE*	*FISCAL YEAR*	*TOTAL COST*
Beaufort	Town of Port Royal	Columbia Ave Sewer Extension	CDBG	2017	$550,182
Beaufort	Beaufort County	Bonaire Sewer Extension	SCRIA	2017	$500,000
Beaufort	Beaufort County	Bonaire Sewer Extension	CDBG	2016	$1,000,000
Beaufort	City of Beaufort	Greenlawn Neighborhood	CDBG	2016	$500,000
Beaufort	Town of Bluffton	Possum Point Sewer	CDBG	2014	$320,000
Beaufort	Town of Bluffton	BIS Village Renaissance- III	CDBG	2013	$500,000
Colleton	City of Walterboro	WWTP Improvements	SCRIA	2016	$500,000
Colleton	Town of Smoaks	Water System Improvements	SCRIA	2016	$500,000
Colleton	City of Walterboro	WWTP Improvements	EDA	2016	$2,040,000
Colleton	Colleton County	Infrastructure to Serve Project C	EDA	2015	$780,000
Colleton	Colleton County	Infrastructure to Serve Project C	SCRIA	2015	$500,000
Colleton	Colleton County	Gadsden Loop Neighborhood	CDBG	2016	$483,502
Colleton	Town of Williams	Water Improvements	CDBG	2016	$256,138
Colleton	Colleton County	Booster Pump Station	CDBG	2014	$558,909
Colleton	Colleton County	Bama Road Drainage	CDBG	2014	$573,279
Colleton	City of Walterboro	Lemacks Village Renaissance III	CDBG	2014	$500,000
Colleton	City of Walterboro	Hampton Street Water	CDBG	2014	$500,000
Colleton	City of Walterboro	South Jefferies Streetscape	CDBG	2013	$500,000
Colleton	Colleton County	Demolition	CDBG	2012	$285,300
Hampton	Town of Brunson	Demolition	CDBG	2017	$92,590
Hampton	Town of Gifford	Demolition	CDBG	2017	$68,940
Hampton	Town of Gifford	Rosenwald School Preservation	CDBG	2017	$150,000
Hampton	Town of Hampton	Nix Street Neighborhood	CDBG	2017	$500,000
Hampton	Town of Estill	Lawton/Second Water Imp.	CDBG	2017	$750,000
Hampton	Hampton County	Fire Trucks	CDBG	2016	$500,000
Hampton	Town of Brunson	Main/Addison NR	CDBG	2015	$319,180
Hampton	Town of Furman	Ashley Circle/Lovely Hill NR	CDBG	2015	$318,983
Hampton	Town of Varnville	Hwy 278 Streetscape	CDBG	2015	$450,000
Hampton	Town of Hampton	Demolition	CDBG	2015	$167,169
Hampton	Town of Hampton	Jackson Street Sewer Rehab	CDBG	2015	$746,224
Hampton	Hampton County	Brunson Gifford Water Imp	CDBG	2014	$1,000,000
Hampton	Hampton County	Brunson Gifford Water Imp	SCRIA	2014	$350,000
Hampton	Town of Yemassee	Sewer Improvements	CDBG	2014	$750,000
Hampton	Hampton County	Health Clinic	CDBG	2013	$500,000
Hampton	Town of Brunson	Water Tank Improvements	CDBG	2012	$347,474
Jasper	Jasper County	Church Stiney NR	CDBG	2017	$500,000
Jasper	Jasper County	Southern Jasper Drainage Study	CDBG	2017	$50,000
Jasper	City of Hardeeville	Boyd Area Drainage	CDBG	2014	$624,000
Jasper	Town of Ridgeland	School Preservation	CDBG	2014	$150,000
Jasper	Town of Ridgeland	Wise Street Pump Station	CDBG	2014	$472,134
Jasper	Jasper County	Old Bailey Sewer Extension	CDBG	2013	$389,050
Jasper	Town of Ridgeland	First Avenue Pump Station	CDBG	2012	$464,000
Jasper	Jasper County	Health Services Addition	CDBG	2012	$500,000