

Livingston County, Michigan

Comprehensive Economic Development Strategy (CEDS) 2014-2018



Presented to

U.S. Department of Commerce, Economic Development Administration

Presented by

Livingston County Department of Planning

LIVINGSTON COUNTY, MICHIGAN

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Robert A. Stanford - AICP, PEM - Principal Planner
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LIVINGSTON COUNTY, MICHIGAN

2014-2018 Community Economic Development Strategy (CEDS) & Community Profiles

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**RESOLUTION TO ACCEPT THE
2014 UPDATE TO THE LIVINGSTON COUNTY, MICHIGAN
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)**

- WHEREAS** The purpose of a Comprehensive Economic Development Strategy (CEDS) is to sustain a local and regional planning process by which jobs are created, more stable and diversified economies are fostered, and living conditions are improved; and,
- WHEREAS** The completed CEDS identifies local economic development strategies and proposed local community development projects for the entire County; and,
- WHEREAS** The CEDS has been endorsed by the Economic Development Council of Livingston County (EDCLC) and Ann Arbor SPARK, which have partnered to provide economic development services to the region; and,
- WHEREAS** The CEDS is a reporting requirement of the U.S. Department of Commerce, Economic Development Administration that a CEDS annual report or a revised/updated CEDS be submitted yearly; and,
- WHEREAS** This CEDS has been prepared and updated to qualify for assistance under the public works, economic adjustment, and planning programs of the U. S. Department of Commerce, Economic Development Administration.

NOW, THEREFORE, BE IT RESOLVED THAT: the Livingston County Planning Commission has received the information herein as compiled by the Livingston County Department of Planning and does hereby accept this Livingston County Comprehensive Economic Development Strategy 2014 update and agrees to support the goals and objectives outlined herein; and

BE IT FUTHER RESOLVED THAT: the Livingston County Planning Commission does hereby authorize and support the submission of the 2014 update of the Livingston County Comprehensive Economic Development Strategy to the U.S. Department of Commerce, Economic Development Administration (EDA) for review and compliance.

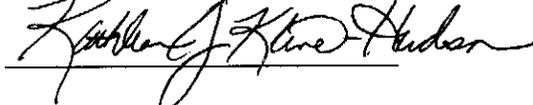
Approved:

Reid Krinock, Chair



Attest:

Kathleen Kline-Hudson, Director

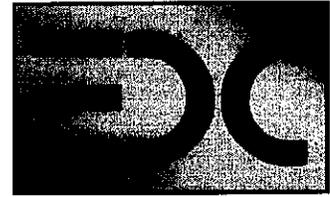


Authorized: Wednesday, May 21, 2014

LIVINGSTON COUNTY PLANNING COMMISSION

Reid Krinock, Chair
Jeanne Clum, Vice Chair
Sylvia Kennedy-Carrasco, Secretary
Bill Anderson

James Sparks
Mike Hubert
Brian Prokuda



April 22, 2014

Livingston County Department of Planning
ATTN: Principal Planner Robert Stanford
304 E. Grand River Avenue
Howell, MI 48843
Sent via Email to planning@livgov.com

RE: Comprehensive Economic Development Strategy (CEDS) for Livingston County

Dear Mr. Stanford –

Thank you, and your entire team, for developing the Comprehensive Economic Development Strategy (CEDS) for Livingston County. The document pays significant attention to Livingston County's assets and a deliberate review of the opportunities and challenges affecting economic growth in Livingston County.

As you know, the Economic Development Council of Livingston County (EDCLC) and Ann Arbor SPARK have partnered to provide economic development services to the region. The CEDS is an important document for our partnership, as it provides a list of assets to utilize, as well as a guide to help drive activities for economic developers in the region.

We are especially pleased that "cooperation & coordination" and "business retention, expansion and recruitment" are core parts of the economic goals outlined in the CEDS. As you know, Livingston County is a model for economic development collaboration within the state – creating a unique regional partnership between the EDCLC and Ann Arbor SPARK. This partnership allows Livingston County to participate in regional, national and international recruitment activities. In addition, retention and expansion activities are at the core of our economic development services. Ann Arbor SPARK conducts retention visits with existing companies in Livingston County throughout the year, assessing their current challenges and opportunities, and connecting them to resources that can assist in their growth. Moreover, proactive project management works to ensure companies are presented with opportunities for location in Livingston County. This partnership has already resulted in commitments for several hundred new jobs and several million dollars in new investment for Livingston County.

Again, thank you for your work in developing a terrific overview and guiding document for the County. We look forward to working with your team on implementing this document and working towards greater economic prosperity in Livingston County.

Sincerely,

A handwritten signature in black ink, appearing to read "Paul Krutko".

Paul Krutko
President & CEO
Ann Arbor SPARK

A handwritten signature in black ink, appearing to read "Scott Griffith".

Scott Griffith
President
Economic Development Council of Livingston County

CC: Belinda Peters, Livingston County

***** NOTICE *****

Livingston County – Department of Planning

April 16, 2014

Livingston County has tremendous potential for economic growth, and in order to identify pathways to these opportunities, the county has created a Comprehensive Economic Development Strategy (CEDS) to help guide development over the next five years.

The Livingston County Department of Planning would like to announce the 30-day public comment period for the update to the CEDS at this time.

The CEDS provides a snapshot of where we are, a blueprint for where we can go, and a proposed set of goals and objectives to follow to further the growth of our economy. The CEDS can be used by municipalities and agencies throughout the county to implement the objectives that support future economic development for Livingston County. This document is required to qualify for economic development funding from the United States Department of Economic Development Administration (EDA).

THE DRAFT 2014 LIVINGSTON COUNTY CEDS CAN BE FOUND ONLINE AT:

<http://www.livgov.com/plan/econdev/Pages/default.aspx>

A hardcopy of the plan is also available in the Livingston County Department of Planning office.

FOR THOSE WISHING TO COMMENT:

Visit the Livingston County Department of Planning, 304 E. Grand River, Howell, MI 48843

Please address letters to the Livingston County Department of Planning, ATTN: Principal Planner Robert Stanford, 304 E. Grand River Avenue, Howell, MI 48843

Call the Planning Department: (517) 546-7555

E-mail: [planning @livgov.com](mailto:planning@livgov.com).

THE DEADLINE FOR ALL COMMENTS IS THURSDAY, MAY 15, 2014 @ 5:00 PM.

CEDS EXECUTIVE SUMMARY

What is the CEDS?

A Comprehensive Economic Development Strategy (CEDS) is designed to bring the public, private, education and not-for-profit sectors together to create an economic roadmap to a diverse and strong local economy. The Strategy should provide the flexibility to adapt to global economic conditions, fully utilize the community's unique advantages to attract private investment and maximize economic opportunity for our area and our economic region.

A CEDS provides public, private, education and not-for-profit decision makers with information needed to target their fiscal and human resources in meeting economic and talent needs and taking advantage of economic opportunities in the region.

The purpose of the CEDS is multifaceted. The CEDS is designed to provide baseline information on demographics and economic data, development of strategies, and identify potential projects within the county and the region. Preparation and adoption of the CEDS maintains grant eligibility for participating units of government. The CEDS document is a working document used by both the public and private sectors to provide leadership with a current picture of the economic state of the county and region as a whole.

The U.S. Department of Commerce Economic Development Administration (EDA) requires the development of a CEDS in order to apply for EDA's *Investment Programs*. These programs are intended to help distressed communities upgrade physical infrastructure, encourage business expansion, conduct technical planning studies, support local economic development strategies, encourage university/government partnerships, receive trade adjustment assistance, attract private capital investment and higher-skill, higher-wage job opportunities and to promote the successful long-term economic recovery of a region.

As a companion to this document, the 2014 Livingston County Community Economic Profiles are being released. The information contained in this document can be used by numerous agencies in developing grants, providing information to clients and business prospects and developing business plans. The profiles document is a separate document to the CEDS in packaging, but works in tandem to achieve similar goals. It will be updated as necessary and will be available on the County website.

This CEDS document is being submitted to the U.S. Economic Development Administration (EDA) by the Livingston County Department of Planning and Livingston County Planning Commission as the update to the Comprehensive Economic Development Strategy (CEDS) Report for Livingston County, Michigan.

Economic Development Partnerships

ANN ARBOR SPARK & THE LIVINGSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL

Between 2012 and 2015, SPARK will partner with the Livingston County Economic Development Corporation (LCEDC). Within this partnership, SPARK will provide a full suite of its business attraction and business development services to the Livingston County region. In turn, the LCEDC will provide funding, local oversight, and community representation in the partnership. SPARK staffs a satellite office in the Brighton Chamber of Commerce, and a satellite office at the Howell Chamber of Commerce.

The Livingston County Economic Development Council (LCEDC) was founded by business leaders in 1984 as a private, nonprofit corporation. Its mission is to retain, attract and expand key businesses in the county. Oversight is provided by a Board of Directors made up of representatives of both the public and private sectors. The EDC is funded by private business contributions, as well as service contracts with local governments and the Livingston County Board of Commissioners.

Regional Strategic Partnerships

It is imperative that in order for long-term success, the vision, goals and objectives of the County's economic plan be compatible and harmonious with other local and regional economic plans that have a direct effect on the County. Two such visions/plans for Livingston County are the Advantage Livingston plan entitled *A Plan for Thriving Together in the New Economy* and the Southeast Michigan Council of Governments (SEMCOG) CEDS plan entitled *Increasing Jobs and Prosperity in Southeast Michigan*.

ADVANTAGE LIVINGSTON

In 2010 the Greater Brighton Area Chamber of Commerce, the Hartland Chamber of Commerce and the Howell Area Chamber of Commerce began a collaboration to develop a strategic growth plan for Livingston County. The process was initiated with a New Economy Economic Summit. At this summit, Michigan's shifting paradigm for success and the New Economic realities at the state and national levels were discussed and examined. Once attendees gained a better understanding of the economic forces that effect local economic development, representatives of the Michigan State University Land Policy Institute outlined a proposed planning process for the Livingston County community. After several community meetings that crossed both organizational and jurisdictional lines, the result was an economic plan for the community at large, entitled: *Advantage Livingston: A Plan For Thriving Together in the New Economy*.

SEMCOG COMPREHENSIVE ECONOMIC DEVELOPMENT (CEDS) PLAN

The SEMCOG Comprehensive Economic Development Strategy (CEDS) incorporates the guidelines and strategic priorities set out by the U.S. Economic Development Administration (EDA) and provides a guide for the effective investment in the SEMCOG region's unique

resources and assets in order to increase jobs and prosperity and to achieve maximum economic impact and competitiveness on a global scale.

The eleven SEMCOG economic strategies build upon existing programs, brings stakeholders together, and explores opportunities across three themes: People (Talent), the Business Climate and Community Assets.

County Report Card

	2000	2013 (estimated)	Change
Population	156,951	184,443	17.5%
Labor Force	89,607	90,542	1.04%
Employed	87,314	83,189	-4.72%
Unemployment Rate	2.6%	8.1%	-5.5%
Per Capita Income	\$28,069	\$32,096	\$4,027
Median Household Income	\$67,400	\$72,396	\$4,996

Source: Bureau of Labor Statistics and the US Census Bureau

• Top Ten Largest Private Industries (2011)

- Food Service & Drinking Places = 3,981 jobs (10 percent of County total)
- Administrative and Support Services = 2,781 jobs (7 percent)
- Transportation Equipment Manufacturing = 2,433 jobs (6.1 percent)

• Top Ten Private Industries by Percent Job Growth (2008-2011)

- Plastics & Rubber Products Manufacturing = 52 percent increase
- Transportation Equipment Manufacturing = 30 percent increase
- Social Assistance = 28.8 percent increase

• Declining Industries (2008-2011)

- Food Manufacturing = 38 percent decline
- Management of Companies and Enterprises = 32 percent decline
- Food & Beverage Stores = 29 percent decline

Composition and Growth of County Industrial Mix (2000-2010)

The industrial mix of an economy can be subdivided into different composition stages that reflect operational and management issues establishments face as they grow from startups to mature companies. Stages provide a different framework for understanding the needs of businesses and supporting their growth - one that could help communities better leverage resources. For, regardless of their industry sector, companies in the same developmental stage experience similar challenges.

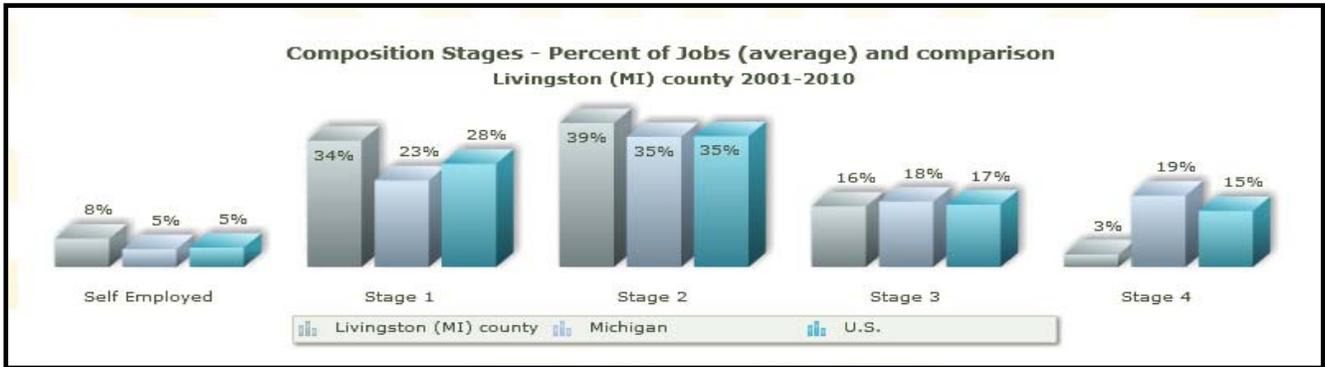
COMPOSITION shows how establishments, jobs, and sales are distributed according to the establishment sectors and employment stages. This section provides you a baseline for seeing what types of employers and stages exist in a region – and their share of establishments and jobs.

GROWTH follows openings, closings, expansions, contractions, move-ins and move-outs (growth factors) of establishments – showing how this activity affects job gains and losses. As companies move through these stages, not only do their internal needs change, but their external needs - what they need from the community - also change. A local economy's Composition Stages consist of the following:

COMPOSITION STAGES	
Self-Employed (1 employee)	Includes small-scale business activity that can be conducted in homes (cottage establishments) as well as sole proprietorships.
Stage 1 (2-9 employees) "STARTUPS"	Includes partnerships, lifestyle businesses and startups. Focus is on defining a market, developing a product or service, obtaining capital and finding customers.
Stage 2 (10-99 employees) "STABLE"	At this phase, a company typically has a proven product, and survival is no longer a daily concern. Companies begin to develop infrastructure and standardize operational systems. Leaders delegate more and wear fewer hats.
Stage 3 (100-499 employees) "EXPANSIONS"	Expansion is a hallmark at this stage as a company broadens its geographic reach, adds new products and pursues new markets. Stage 3 companies introduce formal processes and procedures.
Stage 4 (500 or more employees) "MARKET DOMINATORS"	At this level of maturity, an organization dominates its industry and is focused on maintaining and defending its market position. Key objectives are controlling expenses, productivity, global market penetration and managing market niches.

Source: NETS (National Establishment Time Series) Database

An analysis was conducted for this report in which the Composition Stages for the Livingston County economy was compared to both the State of Michigan and the United States for the period 2001-2010. The results of this analysis are provided in the graphic below.



Source: NETS (National Establishment Time Series) Database, 2013

This analysis relies on data derived from the from the National Establishment Time Series (NETS) database. The NETS database includes employment and sales data on private businesses as well as Non-Governmental Organizations (NGOs) and public sector establishments based on rating tracking from Dun and Bradstreet. Businesses included in the NETS database range from sole proprietorships to large corporations. The NETS database is the most comprehensive accounting of businesses and their performance. Businesses are categorized within the NAICS code in which they are primarily engaged.

According to the analysis, Livingston County Composition Stages closely mirrored those in the State of Michigan and the U.S.

As is the case in all three economies, the largest Composition Stage are Stage 2 companies (10-99 employees, - “stable”), in fact, Livingston County’s economy consists of a higher percentage of Stage 2 companies (39 percent) in comparison to the State and the U.S. (both at 35 percent).

Livingston County had a higher percentage of Self-Employed and State 1 companies (2-9 employees, - “startups”) than the State or the U.S as well.

The County had a slightly lower percentage (16 percent) of Stage 3 companies (100-499 employees, - “expansions”) than the State (18 percent) and the U.S. (17 percent), but the percentage was still respectable given the overall size of the County’s economy (~40,000 employees).

The County lagged behind the State and the U.S. in it’s percentage of Stage 4 companies (500+ employees, “market dominators”) with only 3 percent of the County’s economy composed of these types of companies, as compared with 19 percent at the State and 15 percent in the U.S.

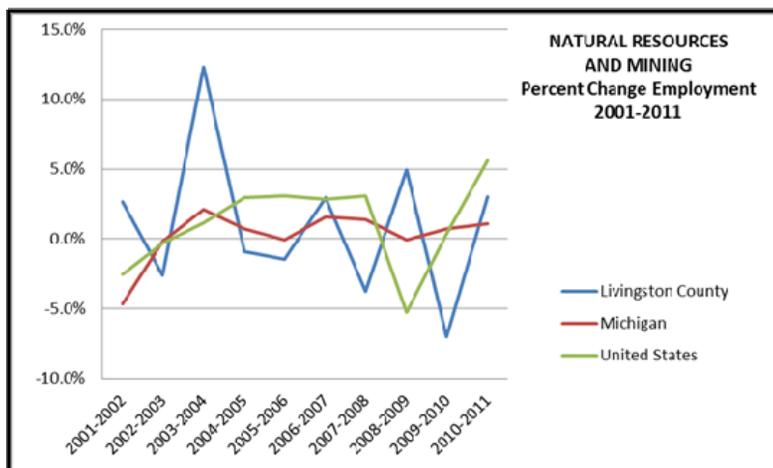
County Location Quotients (2001-2011)

Location Quotients (LQ) measure the relative concentration of a given industry in a given locality compared to a larger area such as the whole nation, the state, or the region. The Location Quotient is the ratio of an industry's share of the local employment (locality) divided by its share of the reference area (the nation, the state, or the region). A Location Quotient of greater than one (+1) indicates that this is a "basic" industry—local production can satisfy local consumption and excess may be exported. A Location Quotient of less than one (-1) indicates that the industry cannot satisfy local consumption and the difference must be imported. A Location Quotient equal to one (=1) indicates production can just meet the local consumption demand.

According to the Location Quotient analysis performed for this report, the Manufacturing sector's export capacity increased between 2001 (LQ= 0.99) and 2011 (LQ=1.12). Similarly, the Retail Trade (2011 LQ = 1.35), Professional and Technical Services (2011 LQ 1.06) and Arts, Entertainment and Recreation (2011 LQ = 1.58) sectors all realized increases in export capacity over the period. At the other end of the spectrum, the loss of local jobs and establishments in the Finance and Insurance sector (NAICS 52) as well as Transportation and Warehousing (NAICS 48-49) contributed to the reduction of their export potential over the period.

Summary of Employment Change by NAICS Sector (2001-2011)

○ Natural Resources and Mining

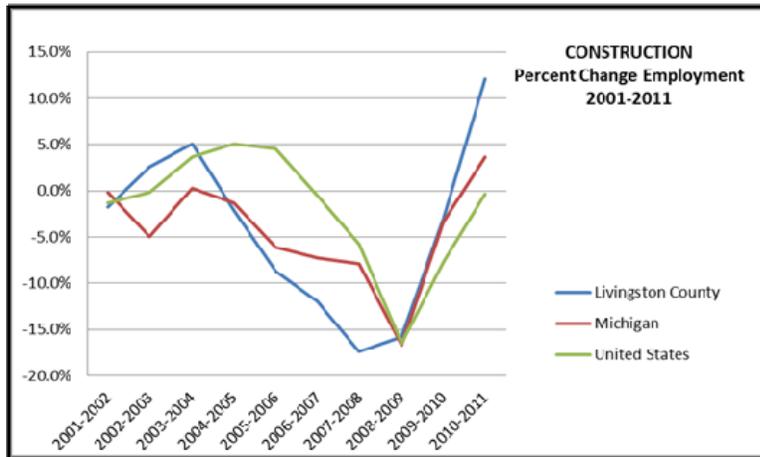


This sector comprises activities such as agricultural production and support activities and mining natural resources. As the chart above indicates, employment patterns in these sectors in the County roughly followed those in both the State and the U.S, except for a significant increase in employment in the County between 2003 and 2004. Percent change in employment ranged between 5 percent

growth and 5 percent decline for the decade.

In 2001 these sectors comprised approximately 1 percent of both the State's and the county's overall industrial mix. Little had changed over the decade, as by 2011, these sectors had still only comprised little more than 1 percent percent of each economy's overall industrial mix.

○ Construction

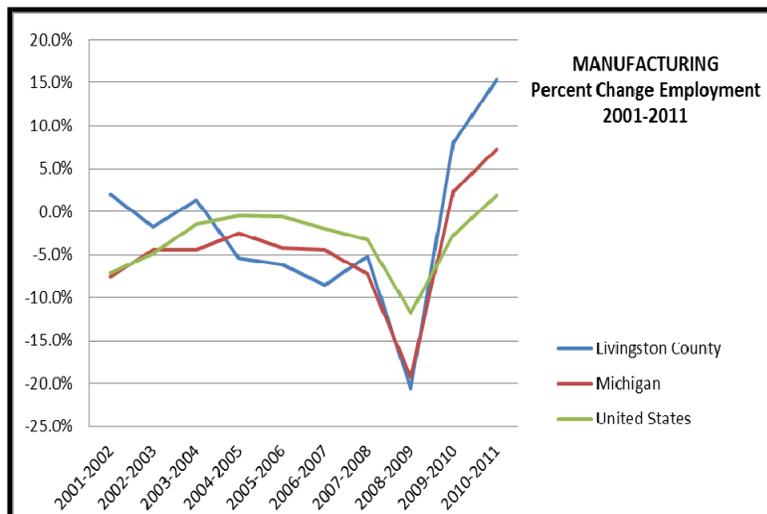


This sector comprises activities such as construction of buildings and infrastructure. As the chart above indicates, employment patterns in these sectors in the County roughly followed those in both the State and the U.S. The economic downturn experienced by the nation and the State of Michigan were similarly reflected in the county. Employment trends in this sector in the county lagged

behind the nation and the State between 2004 and 2009. However, in 2009 began a period of rapid growth in this sector. In 2011, this sector experienced its largest employment gains, as the county saw a 12.1 percent increase.

In 2001, this sector comprised approximately 5.4 percent of the overall industrial mix in the State, and 9.2 percent in the county. By 2011, this sector had declined in both the State (3.8 percent) and in the county (6.2 percent).

○ Manufacturing

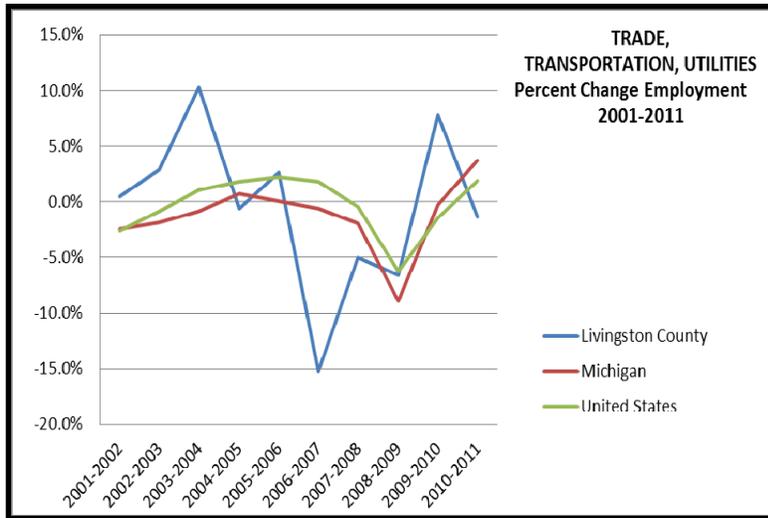


This sector includes the wholesaling of merchandise; the transportation of people and goods; storage; and the provision of utility services. This sector is built upon NAICS sectors: 22, 42, 48, and 49. Within the county, these sectors experienced excellent growth immediately prior to 2001 up to 2003, while throughout the decade, employment trends in these sectors at the State and national levels mirrored each other.

Employment in these sectors at the county level experienced dramatic decline between 2003 and 2007. In 2007, employment trends in these sectors in the county began trending upward which carried through 2010.

In 2001 these sectors comprised approximately 7.9 percent of the State’s and 8.1 percent of the county’s overall industrial mix. By 2011, these sectors comprised approximately 8.2 percent of the State’s and 7.2 percent of the county’s overall industrial mix.

○ **Trade, Transportation, Utilities**

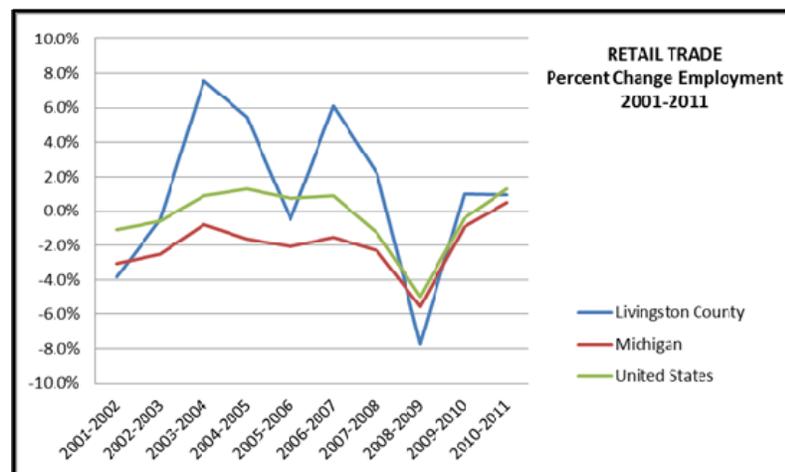


This sector includes the wholesaling of merchandise; the transportation of people and goods; storage; and the provision of utility services. This sector is built upon NAICS sectors: 22, 42, 48, and 49. Within the county, these sectors experienced excellent growth immediately prior to 2001 up to 2003, while throughout the decade, employment trends in these sectors at the State and national levels mirrored each other. Employment in these

sectors at the county level experienced dramatic decline between 2003 and 2007. In 2007, employment trends in these sectors in the county began trending upward which carried through 2010.

In 2001 these sectors comprised approximately 7.9 percent of the State’s and 8.1 percent of the county’s overall industrial mix. By 2011, these sectors comprised approximately 8.2 percent of the State’s and 7.2 percent of the county’s overall industrial mix.

○ **Retail Trade**



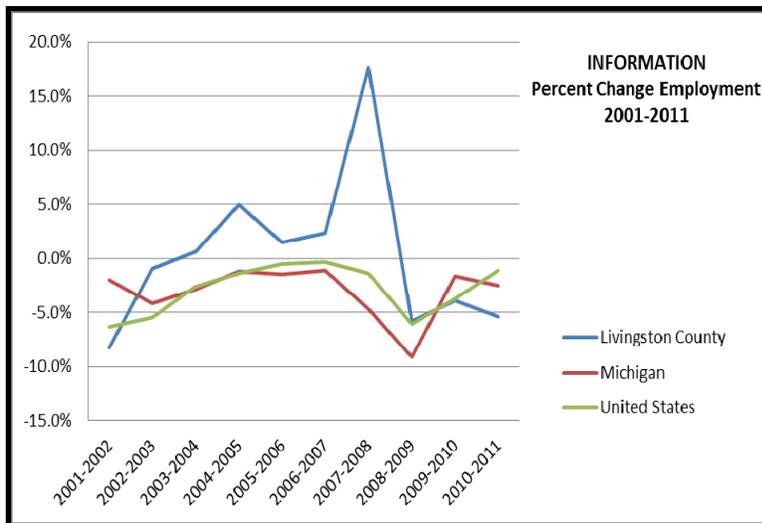
Covers all retail activity, where goods are sold to the general public. This sector is built upon NAICS Sectors 44 and 45. Prior to 2004 within the county, this sector saw excellent growth trends. However, in 2004, this sector experienced a two-year period of dramatic decline. The sector rebounded somewhat between 2006 and 2007. However, this growth was followed by what was the

largest downturn of the decade within the sector between 2007-2009. Since 2009, growth in this sector has again rebounded, leveling off between 2009 and 2011. In comparison,

throughout the decade, employment trends in these sectors at the State and national levels relatively mirrored each other, with much less dramatic upturns and downturns.

In 2001, this sector comprised approximately 14.2 percent of the State’s and 15.7 percent of the county’s overall economic mix. In 2011, approximately 13.5 percent of the State’s and 18.4 percent of the county’s overall industrial mix was found in this sector.

○ **Information**

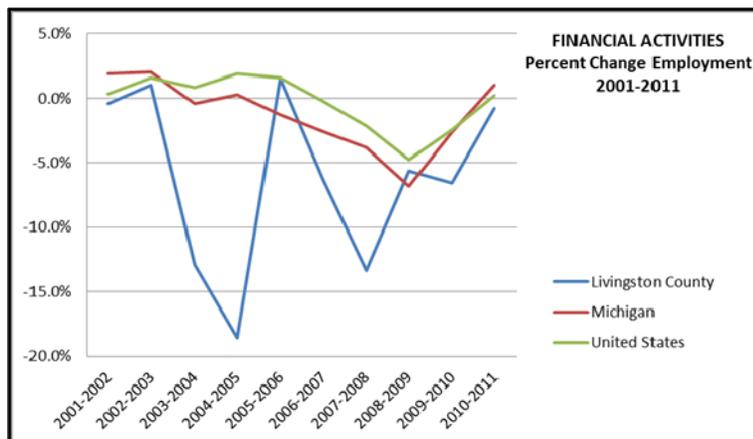


Covers all Information-related jobs. At the county level, this sector saw continue upward employment trends, culminating with a 17.1 percent increase in employment between 2007 and 2008. This trend was followed up by a dramatic decrease (~23 percent) between 2008 and 2009. Since 2009 this sector has begun to trend back upward. In comparison, throughout the decade, employment trends in these sectors at the State and national levels relatively

mirrored each other, with the State lagging behind the nation as a whole between 2005 and 2009.

In 2001, this sector comprised approximately 2 percent of the State’s and 0.8 percent of the county’s overall industrial mix. By 2011, this sector had comprised approximately 1.6 percent of the State’s and 0.7 percent of the county’s overall industrial mix.

○ **Financial Activities**

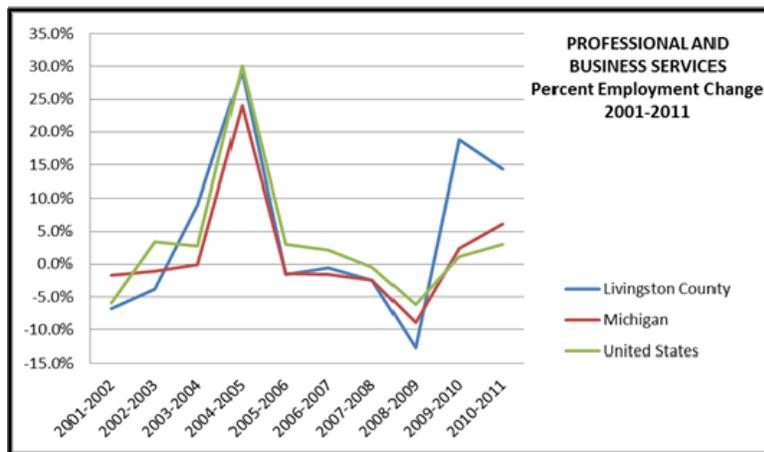


Most of these jobs are for employers engaged in export-oriented services, such as Finance, Insurance, Real Estate, Rental, and Leasing. After a short uptick in employment between 2001 and 2002, this sector saw dramatic decreases over the next two years. These losses were eclipsed by a large increase between 2005-2006. This short growth period was followed by another dramatic decrease in

employment between 2006-2008. However, since 2008, these sectors had again experienced upward employment trends which continued through 2011. In comparison, these sectors at the State and national levels saw modest losses in employment between 2001-2009. As in the county, these sectors begin a period of advancing growth beginning in 2009.

In 2001, these sectors comprised approximately 5.9 percent of the State's and 9.3 percent of the county's overall industrial mix. By 2011, 5.5 percent of the State's and 5.0 percent of the county's overall industrial mix was comprised within these sectors.

○ Professional and Business Services

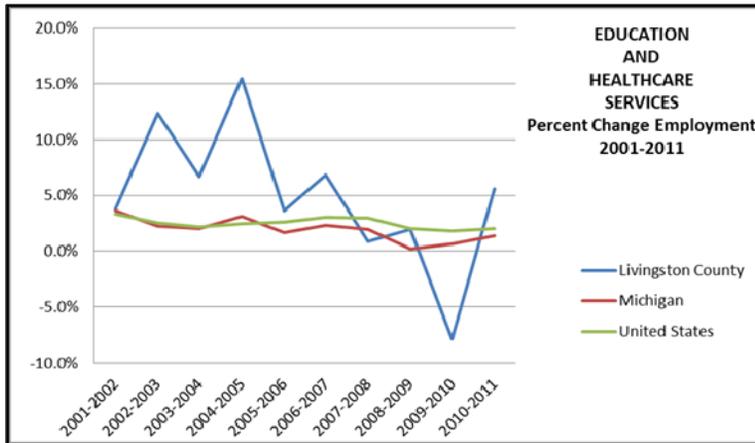


This sector comprises employers who provide support services to firms and general services to households; such as Professional and Technical Services, Management of Companies and Enterprises, Administrative, Support, and Waste Management and Remediation Services, and other services not related to public administration. For the most part, employment trends in

these sectors within the county mirrored trends in both the State and the nation. All three economies experienced a sharp upward spike in employment between 2003-2005, which was followed by a sharp downward spike between 2005-2006, which continued downward over the next 3-year period. Beginning in 2009, this sector began a dramatic increase, with the county's growth rate far surpassing that realized in either of the other two economies. These sectors took a slight downturn between 2010-2011 in the county.

In 2001, these sectors comprised approximately 15.7 percent of the State's and 6.5 percent of the county's overall industrial mix. By 2011, these sectors comprised 16.8 percent of the State's and 15.1 percent of the county's industrial mix.

○ **Education and Health Services**

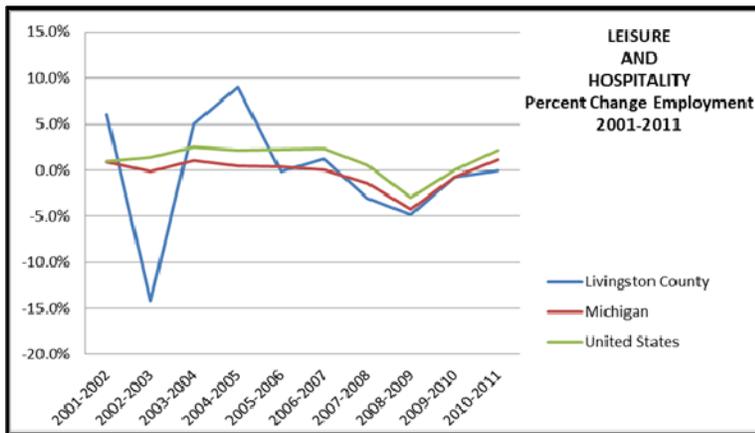


Comprises employers who provide private education for all age groups (K-12 and post secondary), as well as, private healthcare, including hospitals, medical centers, and nursing homes. Within the county, employment trends in these sectors experienced dramatic upturns and downturns between 2001-2010, with a general trend downward over the period. In comparison,

employment trends in these sectors at the State and national levels tended to be somewhat level, ranging between 1 percent and 3 percent growth/decline between 2001-2011. In 2010-2011, the county saw a dramatic uptick in this sector (5.6 percent).

In 2001, these sectors comprised approximately 13 percent of the State’s and 7.2 percent of the county’s overall industrial mix (NOTE: educational services accounted for only 1.2 percent of the State’s and 0.3 percent of the county’s total within this sector group). By 2011, these sectors comprised approximately 18.2 percent (Educational services: 1.9 percent) of the State’s and 12.1 percent (Educational services: 0.5 percent) of the county’s overall industrial mix.

○ **Leisure and Hospitality**



Leisure & Hospitality – Includes all employers who provide arts, entertainment and recreational services and also employers who provide lodging, eating and drinking services. Within the county, after experiencing approximately 6 percent growth between 2001-2002, this sector saw a dramatic decline (-14.2 percent) in 2002-2003.

However, the sector gained back these short-term losses over the following two-year periods. From 2006 to 2011, employment trends in this sector largely mirrored the trends in both the State and the nation, with growth/losses ranging from between 1 percent to 4 percent over this period.

In 2001, the Arts, Entertainment, and Recreation sector comprised approximately 1.6 percent of the State’s and 2.4 percent of the county’s overall industrial mix, while the

Accommodation and Food Service sector comprised approximately 8.6 percent of the State's and 10.3 percent of the county's overall industrial mix. By 2011, the Arts, Entertainment, and Recreation sector comprised approximately 1.5 percent of the State's and 2.3 percent of the county's overall industrial mix, while the Accommodation and Food Service sector comprised approximately 10 percent of the State's and 10.7 percent of the county's overall industrial mix.

SEMCOG Forecasted Job Growth (2010-2040)

The Southeast Michigan Council of Governments (SEMCOG) predicts that overall the county will realize a 30 percent increase in jobs (20,670 jobs) over the 30-year period (1 percent growth per year) between 2010 and 2040.

It is anticipated that the Knowledge-based services industry (built upon the following NAICS sectors: Information; Finance and Insurance; Real Estate, Rental, and Leasing; Professional, Scientific, and Technical Services; and Management of Companies and Enterprises) will see the largest increase in the number of jobs (5,941), followed closely by the Private Education and Healthcare (comprised of employers who provide private education for all age groups (K-12 and post secondary), as well as private healthcare, including hospitals, medical centers, and nursing homes), with an increase of 4,536 jobs. The Manufacturing industrial sector will see a decrease of 836 jobs over the period.

Forecasted Job Growth By Major Occupational Category (2008-2018)

By comparison, another report, regularly performed by the State of Michigan Department of Technology, Management and Budget tracks employment forecasts as well. This report tracks changes in employment by major occupational categories, rather than broad industrial sectors. The table below provides the most recent employment forecasts for the Livingston and Washtenaw County areas for the period 2008 to 2018.

Employment Forecast by Major Occupational Category - 2008 - 2018 - Livingston - Washtenaw County Areas				
Occupational Category	2008	2018	Employment Growth	
			Number	Percent
Total, All Occupations	240,775	263,215	22,440	9.3%
Management	13,615	14,540	925	6.8%
Professional	61,090	69,345	8,255	13.5%
Health Care	18,550	23,020	4,470	24.1%
Service	40,425	44,520	4,095	10.1%
Sales	27,025	28,615	1,590	5.9%
Administrative Support	34,845	37,430	2,585	7.4%
Farming, Forestry and Fishing	990	995	5	0.5%
Construction and Repair	15,915	17,245	1,330	8.4%
Production	17,265	16,135	-1,130	-6.5%
Transportation	11,055	11,365	310	2.8%

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

The table indicates that overall, the total number of employment in all occupations in this two-county region will increase by 22,440 jobs (9.3 percent increase) over the period. Healthcare occupations are expected to realize the largest percent increase over the period at 24 percent, followed by Professional occupations (13.5 percent) and Service occupations (10.1 percent). Professional occupations are expected to see the largest increase in the overall number of jobs in the area at 8,255 new jobs. Production jobs on the otherhand are expected see a decrease of 6.5 percent and a loss of 1,130 jobs over the same period.

Fastest Growing Occupations (2008-2018)

The following table provides an overview of the anticipated ten fastest growing occupations in the two-county area.

Fastest Growing Occupations - 2008 - 2018 - Livingston - Washtenaw County Areas		
Occupations	Employment Change	
	Number	Percent
Network Systems and Data Communications Analysts	190	53.0%
Home Health Aides	560	51.2%
Fitness Trainers and Aerobics Instructors	110	36.5%
Dental Hygienists	175	34.4%
Dental Assistants	225	33.1%
Medical Assistants	325	32.6%
Training and Development Specialists	105	32.3%
Market Research Analysts	115	32.3%
Computer Software Engineers, Systems Software	240	31.4%
Medical Scientists, Except Epidemiologists	190	31.1%

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

Employment in computer network systems and data communications is expected to see the largest percentage change in employment over the period (53 percent), followed closely by home health aid professions (51.2 percent). Of the top ten fastest growing occupations over the period, home health aid occupations are expected to see the largest increase in the number of jobs as well (560 jobs). Overall, jobs in the medical, dental and computer analyst occupational categories are expected to realize the greatest percent increases over the period.

High Demand – High Wage Occupations (2008-2018)

The table on the following page indicates the top ten occupations that are expected to garner the highest demand and highest wages in the two-county region over the period.

High Demand - High Wage Occupations - 2008 - 2018 - Livingston - Washtenaw County Areas			
Occupations	Growth Rate	Annual Openings	Hourly Wage
Computer Software Engineers, Systems Software	31.4%	30	\$41.55
Computer Software Engineers, Applications	30.2%	33	\$40.07
Medical Scientists, Except Epidemiologists	31.1%	31	\$34.86
Network and Computer Systems Administrators	25.2%	33	\$39.52
Dental Hygienists	34.4%	29	\$32.74
Registered Nurses	23.4%	175	\$29.48
Sales Managers	17.1%	29	\$49.01
Accountants and Auditors	16.2%	60	\$31.86
Logisticians	19.0%	30	\$31.24
Public Relations Specialists	22.9%	29	\$28.53

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

Employment in computer software engineering, medical science, and dental hygiene head the list of high demand occupations through the year 2018 (all over 30 percent growth). Also in high demand will be network and computer systems administrators (25 percent), registered nurses (23 percent) and public relations specialists (23 percent). The Registered nursing occupational category is also supposed to see the largest number of openings on an annual basis (175 jobs per year), followed closely by accountants and auditors (60 jobs per year). Most of the other occupations in this category are expected to see approximately 30 openings per year. Of those occupations in the highest demand, sales management positions are expected to see the highest hourly wage at \$49 per hour, followed by computer software engineers at between \$40 and \$42 per hour.

High Growth Jobs with an Associates Degree / Work Experience (2008-2018)

The table below indicates the top ten occupations expected to be the highest growth in association with possession of at least an associate's degree or work experience.

High Growth Jobs with an Associate's Degree or Work Experience - 2008 - 2018 - Livingston - Washtenaw County Areas			
Occupations	Numeric Job Growth	Percent Job Growth	Hourly Wage
Registered Nurses	995	23.4%	\$29.48
Executive Secretaries and Administrative Assistants	380	11.5%	\$20.77
Licensed Practical and Licensed Vocational Nurses	200	26.7%	\$20.66
Dental Hygienists	175	34.4%	\$32.74
Self-Enrichment Education Teachers	175	28.9%	\$22.84
First-Line Sup/Mgrs of Const Trades and Extraction Workers	105	13.9%	\$32.21
Heating, Air Conditioning, Refrigeration Mechanics & Installers	75	21.5%	\$25.69
Physical Therapist Assistants	60	45.2%	\$21.89
Civil Engineering Technicians	50	15.5%	\$24.92
Insurance Sales Agents	50	12.9%	\$25.09

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

The table indicates that the registered nursing occupation will expect to realize nearly 1000 new jobs over the period (23 percent job growth). The growth in this occupational category will be nearly three times that of the occupation with next largest numeric job growth, that being executive secretaries and administrative assistants (380 jobs, 11.5 percent growth). Once again, occupations in the medical, dental fields dominate this category. The field of physical therapy is expected to see the largest percentage gain in employment within this top ten, at 45 percent (60 jobs). Supervisors and managers of construction trades, along with dental hygienists and registered nurses should garner the highest hourly wages of this grouping, earning an average of between \$29 and \$32 per hour.

High Growth Jobs with at Least a Bachelor's Degree (2008-2018)

The table below indicates the top ten occupations expected to be the highest growth in association with possession of at least a bachelor's degree.

High Growth Jobs with at Least a Bachelor's Degree - 2008 - 2018 - Livingston - Washtenaw County Areas			
Occupations	Numeric Job Growth	Percent Job Growth	Hourly Wage
Computer Software Engineers, Applications	255	30.2%	\$40.07
Computer Software Engineers, Systems Software	240	31.4%	\$41.55
Computer Systems Analysts	225	23.3%	\$40.52
Network and Computer Systems Administrators	195	25.2%	\$39.52
Network Systems and Data Communications Analysts	190	53.0%	\$36.47
Medical Scientists, Except Epidemiologists	190	31.1%	\$34.86
Instructional Coordinators	175	22.1%	\$30.60
Management Analysts	130	15.5%	\$39.48
Market Research Analysts	115	32.3%	\$28.62
Civil Engineers	100	24.3%	\$37.64

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

The data shows that computer software engineers and computer system analysts will realize the largest growth in the number of jobs (between 225 and 255 jobs) over the period. Network and computer systems analysts along with medical scientists should see a total increase of approximately 190 jobs. Civil engineers, market researchers and management analysts are expected to see an overall increase of between 100 and 130 jobs over the period.

County SWOT Analysis

In order to better gauge the direction our community must go to achieve success and sustainability in the future and to gain a more direct perspective of the goals and objectives for the CEDS Plan, a simple SWOT analysis is necessary. A SWOT analysis stands for:

Strengths

Weaknesses

Opportunities

Threats.

A SWOT analysis is a useful tool to identify the positives and negatives inside community and outside of it. Developing a full awareness of your current situation can help with both strategic planning and decision-making. Insofar as they are appointed to serve and represent the different sectors as well as geographic locations of the County, the Livingston County Planning Commission undertook a SWOT analysis exercise by addressing questions related to each SWOT category. The table on the following page summarizes the results of this exercise.

<u>Strengths</u>	<u>Opportunities</u>
<p>County Planning Department provides comprehensive and coordinated planning services to member communities - communities working together.</p> <p>Recreation areas are being accomplished more often (Parks).</p> <p>Community does a good job of bringing people together within the County for special events, like Balloonfest and the Light Parade.</p> <p>County has good highway access in all directions.</p> <p>County has room to develop its highway and business districts/corridors.</p> <p>County public transit provides inexpensive transportation for seniors.</p> <p>County airport capable of bringing in cargo and general aviation aircraft.</p> <p>Livingston County government balances its budget.</p> <p>Cities, Villages and Townships within the County get along with each other, cooperation.</p> <p>Livingston County has strong community and intergovernmental collaboration.</p>	<p>Senior living and care facilities seem to be a good fit for our area. Promote and grow our medical center.</p> <p>The possibility of a county-wide school board instead of local towns to cut costs.</p> <p>Shared services between local governments.</p> <p>The increase in our region's senior population is a growing trend, as well as the willingness to develop and support more mass transportation opportunities in SE Michigan.</p> <p>The county is more of a "blank slate" for potential land development of senior living environments and entertainment. Some resources are already here, such as recreational opportunities. There has been an increase recently in new senior living developments, however, growth in this sector is still an untapped opportunity.</p> <p>Untapped agricultural history and expertise in the county and agribusiness technologies could really take hold in this community.</p> <p>We are a prime location for a satellite or branch campus of a major university, perhaps located near the new I-9/Latson Road interchange.</p>
<u>Weaknesses</u>	<u>Threats</u>
<p>Planning for the senior population is still very poor.</p> <p>Better job of attracting business and industry that is not auto-dependent. More niche-business development.</p> <p>County is vulnerable as a community that might not be appealing to anyone who does not want the commuting lifestyle.</p> <p>Road maintenance could be much better.</p> <p>We need to work on business districts with a mix of commercial and living.</p> <p>County communities struggle with development pressure versus losing our rural charm.</p>	<p>Increased crime from surrounding counties pose a threat to our community.</p> <p>The abundance of empty buildings in neighboring communities.</p> <p>Poor cellular coverage on multiple networks.</p> <p>Reluctance to try new land use and economic development techniques.</p> <p>Funding for projects is a threat to our community, given our population income levels.</p> <p>Possible out migration of senior-aged persons who cannot "age in place" within Livingston County.</p> <p>Increased sprawl.</p>

County CEDS Vision and Goals

A strategic plan is more than a list of problems to be solved or opportunities to be pursued. It begins with a realistic vision, or direction, for the future that is widely shared. If it is to be achieved, this vision must be translated into realistic goals and actions to accomplish these goals. These goals and actions are the core of an effective strategic plan.

This set of Goals and Objectives (on the following page) were developed after reevaluating the Goals and Objectives from the previous County CEDS (2007), incorporating input stemming from the Planning Commission's SWOT analysis as well as comments and recommendations received from SPARK and the public at-large, and attempting to coordinate this document with SEMCOG's CEDS and the Advantage Livingston initiative.

VISION:

The sustained creation of community wealth through the retention, expansion and development of diversified business opportunities that are compatible with the natural environment, existing land uses, infrastructure and the local workforce, and which enrich the County's quality of life.

GOALS:**BUSINESS RETENTION, EXPANSION & RECRUITMENT**

Support the retention and expansion of County businesses and support recruiting efforts for new business through both general and targeted, market based support. Focus on economic development initiatives that: are proactive; are part of a broader economic strategy; diversify the economy; raise the standard of living; create higher-skilled, higher-wage jobs; maximize private investment; maximize return on taxpayer investment; and/or increase the tax base.

TALENT ENHANCEMENT AND DEMAND DRIVEN OPPORTUNITIES

Encourage and support high quality employment services, talent development and demand driven employment opportunities. A sustained quality education system provides training for skilled workers, harnesses talent, promotes civic engagement, and offers rewarding career and lifelong learning opportunities. It is important to identify what the demand for jobs will be in the near future (2-4 years) and train for those jobs as well.

COOPERATION & COORDINATION

Promote a cooperative and coordinated approach to economic development.

REGULATIONS & TAXES

Work to reduce tax and regulatory burdens on County businesses, consistent with maintaining an adequate level of public service and a high quality of life. Taxes and regulations can create disincentives to private investment and can reduce the County's competitiveness.

TRANSPORTATION, UTILITIES & OTHER INFRASTRUCTURE

Support improvements to the County's physical infrastructure that is necessary to attract and sustain economic development.

LAND USE & DEVELOPMENT

Promote "smart growth" policies that encourage an economically healthy mix of land uses, housing opportunities and transportation alternatives, natural resource protection, efficient use of land and infrastructure, lower public infrastructure costs, and a high quality of life.

Measurable CEDS Progress Methods

As part of efforts to continually monitor and evaluate the effectiveness of this regional economic development strategy, two (2) types of performance measures will be tracked on an annual basis:

- Regional economic conditions
- Programmatic measures

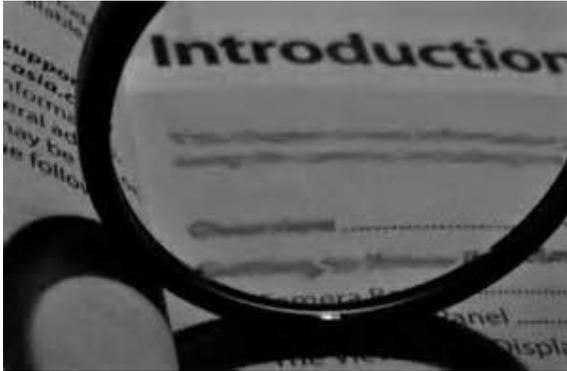
The following performance measures will be monitored under **Regional Economic Conditions**:

- A. The **number of new jobs created** in Livingston County. Data from the Livingston County Michigan Works! Agency will be used to track this performance measure.
- B. The **Unemployment rate** in Livingston County as compared to the State of Michigan and U.S. Data from Bureau of Labor Statistics (BLS) will be used to track this performance measure.
- C. The **Per Capita Income and Median Household Income** for each county as well as local communities with Livingston County as reported by the most recent U.S. Census or America Community Survey (ACS) data.

The following performance measures will be monitored under **Programmatic Measures**:

- A. The **amount of Small Business Loans approved**, including the amount of private funding leveraged and number of jobs created.
- B. The **amount of Public Infrastructure and Community Development projects funded**, including the amount of other funds leveraged.
- C. The **amount of Technical Assistance and Planning Projects funded**, including the amount of other funds leveraged.

Data for these performance measures will be obtained through the Livingston County Michigan Works! agency among others.



INTRODUCTION AND PURPOSE

Sustained economic growth is a driving force behind creating jobs for residents, decreasing the social impacts of a poor economy, and providing the tax base needed for public services and for increased quality of place assets.

A Comprehensive Economic Development Strategy (CEDS) is designed to bring the public, private, education and not-for-profit sectors together to create an economic roadmap to a diverse and strong local economy. The Strategy should provide the flexibility to adapt to global economic conditions, fully utilize the community's unique advantages to attract private investment and maximize economic opportunity for our area.

There are numerous benefits of developing and maintaining a CEDS:

- A CEDS provides public, private, education and not-for-profit decision makers with information needed to target their fiscal and human resources in meeting economic and talent needs and taking advantage of economic opportunities in the region.
- The U.S. Department of Commerce Economic Development Administration (EDA) requires the development of a CEDS in order to apply for EDA's *Investment Programs*. These programs are intended to help distressed communities upgrade physical infrastructure, encourage business expansion, conduct technical planning studies, support local economic development strategies, encourage university/government partnerships, receive trade adjustment assistance, attract private capital investment and higher-skill, higher-wage job opportunities and to promote the successful long-term economic recovery of a region.
- As a companion to this document, the 2014 Livingston County Community Economic Profiles are being released. The information contained in this document can be used by numerous agencies in developing grants, providing information to clients and business prospects and developing business plans. The profiles document is a separate document to the CEDS in packaging, but works in tandem to achieve similar goals. It will be updated as necessary and will be available on the County website.

This CEDS document is being submitted to the U.S. Economic Development Administration (EDA) by the Livingston County Department of Planning and Livingston County Planning Commission as the update to the Comprehensive Economic Development Strategy (CEDS) Report for Livingston County, Michigan.



POLITICAL GEOGRAPHY

Livingston County is located in southeast Michigan, encompassing approximately 374,311 acres or 585 square miles. Livingston is bordered on the north by Genesee and Shiawassee Counties, on the south by Washtenaw and Jackson Counties, on the east by Oakland County, and on the west by Ingham County. Furthermore, Livingston is composed of twenty-one separate political jurisdictions: the County itself, thirteen townships, three charter townships, two cities, and two villages.

Livingston County is a general law County effected under an Act of the State Legislature on March 24, 1836. The County is governed by a Board of Commissioners that represent their respective voting districts. The Board is comprised of 9 members who are elected on a partisan basis for two year terms. The County also has an appointed County Administrator who handles the day-to-day administration of personnel and the County budget.

REGIONAL PLANNING AGENCIES

The southeast region is under the “umbrella” of the Southeast Michigan Council of Governments (SEMCOG). SEMCOG is a nonprofit organization that solves regional problems. SEMCOG is responsible for adopting regional plans and policies for land use, economic development, air and water quality protection, and transportation, including approval of state and federal transportation projects. Funding for SEMCOG is provided by federal and state grants, contracts, and membership fees.

STATE ENABLED AUTHORITIES

There are several different entities in Livingston County that hold taxing and regulatory authority. These entities are granted authority through state enabling legislation.

BROWNFIELD REDEVELOPMENT AUTHORITIES

Seven local municipalities have established a Brownfield Redevelopment Authority: the cities of Brighton and Howell, the Villages of Fowlerville and Pinckney, Green Oak and Genoa Charter Township and Hamburg Township. A Brownfield Redevelopment Authority is established pursuant to Public Act 381 of 1996, as amended. Under this Act, the governing body of a local unit of government has the authority to use tax increment financing to pay for all eligible costs associated with redeveloping environmentally contaminated properties.

LIVINGSTON COUNTY AERONAUTICAL FACILITIES BOARD

The Livingston County Board of Commissioners created an Aeronautical Facilities Board on May 27, 1975, as enabled by Public Act 327 of 1945. This Board consists of a five member committee, with each member appointed to a five-year term. In addition to the Aeronautical Facilities Board, the Board of Commissioners appointed an Airport Zoning Board of Appeals which reviews any zoning decisions that may affect the clear fly zone established for the Livingston County airport.

COUNTY POLITICAL GEOGRAPHY

Thirteen of Livingston County's sixteen townships are general law townships. The Charter Townships of Brighton, Genoa and Green Oak are the exceptions. Unlike charter townships, cities and villages, general law townships cannot levy millage on residents without a vote of the people and are funded mainly through State Shared Revenues. Consequently, general law townships do not offer street cleaning, refuse hauling, sidewalk maintenance or other services if residents have not passed a millage to cover the cost. General law townships are also prohibited by law from constructing or maintaining their own roads which are, instead, the legal jurisdiction of the County Road Commission.

LIVINGSTON COUNTY POLITICAL GEOGRAPHY			
<i>Community</i>	<i>Political Structure</i>	<i>Downtown Development Authority</i>	<i>Brownfield Redevelopment Authority</i>
Brighton Township	Charter Township - Board of Trustees	No	No
Green Oak Township	Charter Township - Board of Trustees	No	Yes
Genoa Township	Charter Township - Board of Trustees	No	Yes
Cohoctah Township	General Law Township - Board of Trustees	No	No
Conway Township	General Law Township - Board of Trustees	No	No
Deerfield Township	General Law Township - Board of Trustees	No	No
Hamburg Township	General Law Township - Board of Trustees	No	Yes
Handy Township	General Law Township - Board of Trustees	No	No
Hartland Township	General Law Township - Board of Trustees	No	No
Howell Township	General Law Township - Board of Trustees	No	No
Iosco Township	General Law Township - Board of Trustees	No	No
Marion Township	General Law Township - Board of Trustees	No	No
Oceola Township	General Law Township - Board of Trustees	No	No
Putnam Township	General Law Township - Board of Trustees	No	No
Tyrone Township	General Law Township - Board of Trustees	No	No
Unadilla Township	General Law Township - Board of Trustees	No	No
City of Brighton	Council-Manager	Yes	Yes
City of Howell	Council-Manager	Yes	Yes
Village of Fowlerville	Council-Manager	Yes	Yes
Village of Pinckney	Council-President	Yes	Yes
Livingston County	Board of Commissioners	N/A	No

SOURCE: Livingston County Department of Planning, Individual Contacts



(based on 2008 SEMCOG/MDNR data).

COUNTY LAND USE PROFILE

The information in this section has been compiled by the Southeast Michigan Council of Governments (SEMCOG) and the Michigan Department of Natural Resources and provides a “snapshot” of general development patterns in the year 2010. The map at the end of this chapter indicates the distribution of major land uses in the County as of December 2013

AGRICULTURE

Agriculture is the second largest land use category in Livingston County. At over 98,831 acres, 26.4 percent of county land is used for agricultural related purposes. Much of this farmland is concentrated in the more rural west and northwest portion of the County. While at least half of Conway, Handy, Cohoctah and Iosco Townships remain agricultural, no more than 15 percent of Hamburg, Brighton, Green Oak, and Genoa Townships (in the southeast) are in agricultural use.

SINGLE FAMILY RESIDENTIAL

At over 194,132 acres, single family residential land uses utilize more than half (51 percent) of Livingston County’s available land. Development has been significant for Livingston County even during the most recent economic downturn. As the county sees an increase in new residential population, more development will be needed to accommodate a growing interest and desire to locate within the County. This land use category is defined as detached single family dwelling units and includes two-family structures, seasonal dwellings, and manufactured homes located outside of designated mobile home parks. Farm residences are excluded and counted, instead, as an agricultural use.

The townships in the southeast quarter of the county contain the highest percentage of land in single family residential use due to the proximity of U.S. 23 and I-96 providing easy access to southeast Michigan population centers. Tyrone and Hartland Townships have experienced higher residential growth due to the hub of U.S. 23 and M-59, both of which serve as important transportation corridors. In 2000, the more rural townships in the northwest quadrant of the county contained less than 11 percent single family residential development. This pattern continues to hold at this time with most of the southeast quadrant of the county containing 25 percent to 50 percent of the current residential

growth. In the cities and villages, the amount of land occupied by single family residences ranged from a high of 44 percent in Pinckney to a low of 30 percent in Fowlerville.

MULTI-FAMILY RESIDENTIAL

According to SEMCOG estimates, approximately 700 acres of county land is used as multiple family residential. This land use category is defined as residential structures containing three or more attached dwelling units and groupings of three or more manufactured home sites in a planned community.

The only township with notable amounts of multi-family residential development was Genoa, with 375 acres. All of the other townships had less than 1 percent of their area in multifamily residential use, and four townships had none. As would be expected, there is a higher percentage of multi-residential housing in the cities and villages.

COMMERCIAL / OFFICE

Commercial land use occupies approximately 2 percent of land in Livingston County. The commercial/office category consists of traditional downtowns with structures having minimum retail floor space of 100,000 square feet; retail centers having a minimum floor space of 250,000 square feet; strip centers having a minimum floor space of 50,000 square feet; and freestanding office buildings having a minimum floor space of 18,000 square feet.

Given this rather limited definition of commercial/office use, only 0.5 percent of Livingston County was categorized in 2000. Since access is a key element for the location of most commercial establishments, it is not surprising that most of this development is located along the Grand River/I-96 corridor.

INDUSTRIAL

This category consisting of light industry, heavy manufacturing plants, industrial parks at least ten acres in size, and extractive activities, comprised almost 10,000 acres in 2008. In the incorporated area, Howell contained the most industrial acreage and Pinckney contained the least. In the unincorporated area, the greatest amount of industrial land was located within Brighton Township, followed by Green Oak Township. The only other townships to have more than 1 percent of land area for industrial use are Howell and Genoa.

INSTITUTIONAL

Institutional uses are generally described as land and facilities that are available to the public or a limited number of persons without profit being the principle intent (churches, schools, municipal properties). As of 2008, only 1.8 percent (6,732 acres) of Livingston

County was so developed. Among the Townships, Green Oak had the most institutional land use with 1.2 percent with all other townships having less than 1 percent. As the County seat, it is not surprising that the City of Howell contained the most public acreage due to city offices and Livingston County properties located within the City of Howell boundaries.

VACANT

This category, which includes open areas covered only in grass and shrubs, is the third most common land cover. In 2008, over 33,000 acres of land in Livingston County fell under this classification. The western and northernmost townships tend to have the most vacant land. Among the cities and villages, Brighton contained the greatest number of undeveloped acres and Fowlerville contained the least.

WATER

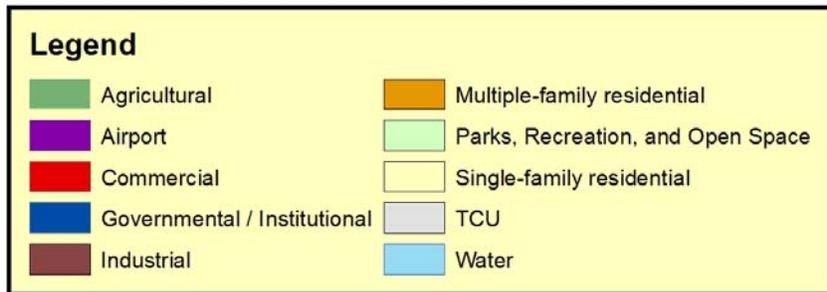
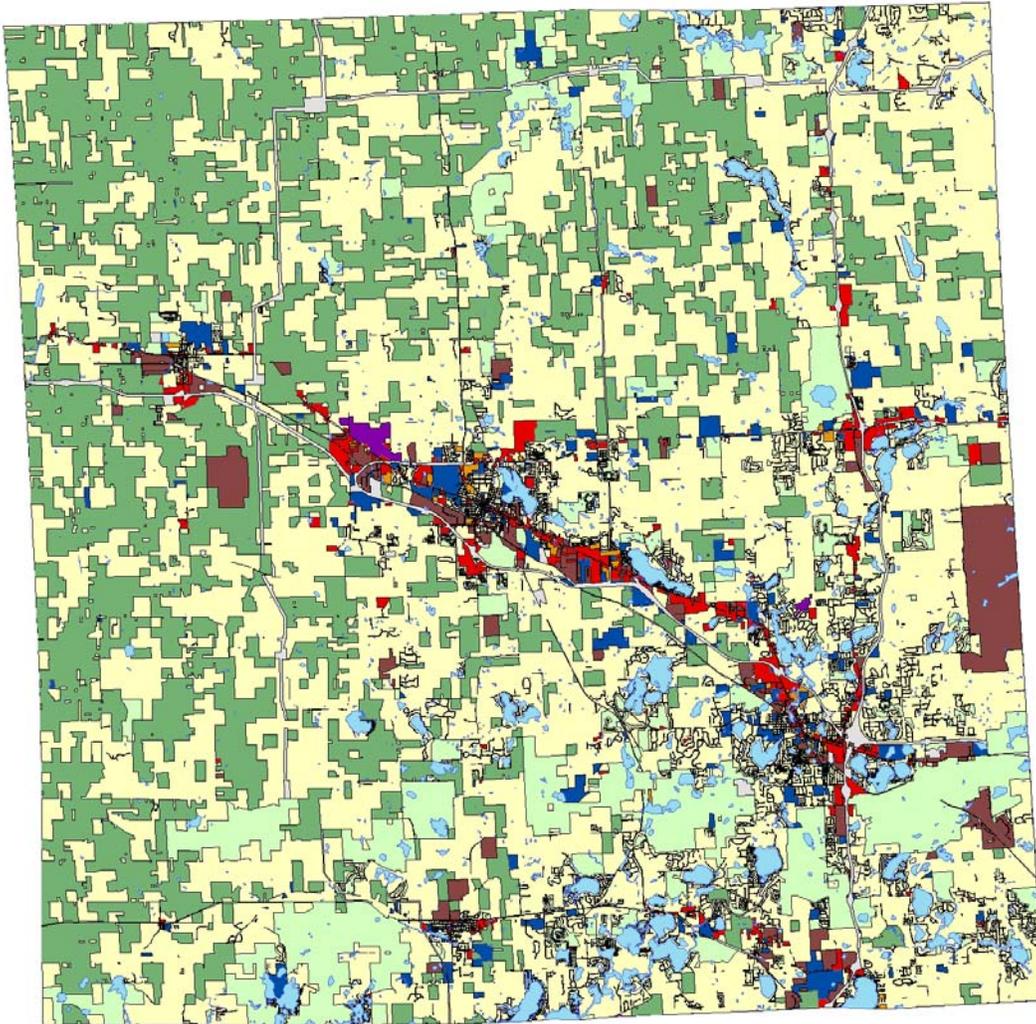
Waterways provide important environmental, economic and social benefits. With more than 12,800 acres of lakes, rivers and streams, surface waters covered over 3.4 percent in 2008. Nearly 60 percent of this acreage consisted of the County's 48 major lakes. Unlike woodlands and wetlands, which are scattered throughout the County, the vast majority of large rivers and lakes (over 80 percent) are located in the southwest quadrant.

RECREATION AND OPEN SPACE

This land use category, which includes recreation facilities, accounted for 8.9 percent of the County's total land area in 2008. It is interesting to note that the amount of township land in this category is directly related to the number of golf courses. For example, Hartland Township and Genoa Township were home to six golf courses and have the most available recreational land use. The City of Howell had approximately 50 acres in recreational use and the remaining cities and villages had between 35 and 40 acres.

Many smaller community parks are scattered throughout Livingston County, as well as several large regional and state parks including Kensington and Huron Meadows Metroparks, Pinckney, Brighton, and Island Lake State Recreational Areas, and Gregory and Oak Grove State Game Areas. County residents also have access to Lakelands Trail State Park. The trail head for this linear park, which has been converted from an abandoned railroad corridor, is located $\frac{1}{4}$ mile north of downtown Pinckney on D-19.

Livingston County, Michigan Land Use



Map Produced by the Livingston County Department of Planning, December, 2013.



COUNTY NATURAL RESOURCES PROFILE

Livingston County contains an abundance of rivers, lakes, wetlands, woodlands and rolling hills, which all make important contributions to the County's quality of life. Protecting these natural features is of primary importance to many residents due to the economic, environmental, recreational and educational benefits they provide.

In terms of development, natural resources present both constraints and opportunities. Slope, vegetation, soil, and drainage patterns influence both the natural and built

environment. For example, soils and topography impact the stability of building and road foundations, the functioning of septic systems, stormwater drainage, and well location. While these factors can restrict development, the County's lakes, rivers and woodlands provide both scenic and recreational opportunities.

The various components of the natural environment function and interact as part of a larger ecosystem. It is important to understand the interaction between these components and that altering any one of them will inevitably affect all others. Development costs and risks to the environment can be minimized by carefully considering natural resources throughout all phases of the land use planning and development process.

ENVIRONMENTAL PLANNING

The relationship between environmental planning and economic development is often complicated and poorly understood. Ecologist Garrett Hardin's "tragedy of the commons" (Hardin, 1968) is a useful concept for understanding the connection between environmental and economic health.

Hardin's parable involves a pasture "open to all" and, therefore, subject to the behavior of many individual users acting alone. He asks us to imagine the grazing of animals on this common ground. Individuals are motivated to add to their flock to increase personal wealth. Yet, every additional animal degrades the commons a small amount. The benefit from the additional animal belongs to its owner alone, while the harm to the commons is shared proportionally by all its users.

Hardin recognized that this concept applies in its broader sense to a great many modern environmental problems (e.g., air and water pollution). Simply stated, the relationship between the environment and economy is one where individual rational behavior (i.e.,

acting without restraint to maximize personal short-term gain) can cause long-term harm to the environment, the economy, the community and ultimately oneself. Long before Hardin, Aristotle summed up this concept by noting “what is common to the greatest number has the least care bestowed upon it” (see Ostrom, 1990).

Protecting the natural resources on which we all depend is not without cost. For example, the cost of installing new pollution prevention technology or the cost of cleaning up pollution after it has occurred. These costs are generally passed along to the consumer which, as a result, may reduce demand for the product. Higher cost and lower demand are powerful disincentives to businesses that want to protect the environment. However, the U.S. E.P.A. estimates that the cost of preventing pollution is about one tenth the cost of cleaning it up.

GEOLOGY, SOILS AND TOPOGRAPHY

The geology and soils of Livingston County were formed by glaciers thousands of years ago. The northwest portion of the County is generally composed of *till* or *outwash plains*, which are relatively flat areas where advancing and retreating glaciers deposited saturated sand and gravel of various sizes. A mix of soil particle sizes increases the soils’ ability to hold moisture and nutrients and is therefore an area where farming tends to be focussed. The southeastern portion of the County is generally characterized by *end moraines*, which are somewhat flat to hilly areas where melting glaciers left large deposits of similarly sized soil particles. These well-sorted soils may be coarse and highly permeable sand or gravel, or fine and less permeable silts, mucks and clays. A series of coarse-textured *end moraines* form a ridgeline across the County from the northeast to southwest. Underlying all of these glacial materials (referred to as *glacial drift*) is bedrock, a gently rolling sedimentary rock formation.

HYDROLOGY

Marion Township is the source of two major rivers: the Shiawassee River, which begins at Coon Lake and flows north into Shiawassee County, and the Red Cedar River, which begins at Cedar Lake and flows northwest into Ingham County. The southeast portion of Livingston County lies within the upper Huron River Watershed. The Huron River flows southeast through Oakland, Washtenaw and Wayne Counties and, ultimately, into Lake Erie.

Many high quality wetlands and streams feed into these major river systems and the County’s abundant lakes and ponds. Nearly 500 acres of lakes and ponds are scattered throughout the County, although most lie in the southeast quadrant. These range in size from very small ponds (less than one acre) to large lakes (more than 300 acres) such as Lake Chemung and Woodland Lake.

Groundwater is also an important component of the County's hydrology, from both ecological and human perspectives. Groundwater cools surface waters and stabilizes water levels and flow. Groundwater pollution can cause human health concerns by contaminating the drinking water supply. Paving over permeable areas reduces groundwater recharge, which in turn reduces the availability of groundwater and surface water levels.

WOODLANDS, WETLANDS AND WILDLIFE HABITAT

Livingston County's abundant waterways, wetlands, and woodlands provide excellent natural habitat for a wide variety of plants and animals. According to SEMCOG, these natural features covered over 110,000 acres or just under one third of the County. Ensuring the long-term preservation of wildlife habitat is a major priority Countywide. For this reason, it is important for all Livingston communities to be aware of significant wildlife areas in their jurisdiction, and to try to mitigate development impacts.

To assist communities, the Michigan Department of Natural Resources (MDNR) maintains a continuously updated database of plant and animal species, as well as natural communities, for every County in the state. These include species and ecosystems that are considered "endangered", "threatened", "of special concern", or "probably extinct". This database, which is maintained by the Michigan Natural Features Inventory (MNFI), is for use by both the private and public sector when developing land use plans.

The Livingston County Department of Planning has also inventoried, analyzed, prioritized and mapped high quality natural areas based on ecologically based land use criteria in its document entitled *Livingston County's High-Quality Natural Areas*. The resulting report provides planning guidance (i.e., for developing comprehensive plans and ordinances) by identifying the general location and ecologic value of natural areas.

ENVIRONMENTAL ISSUES ASSOCIATED WITH LAND USE

Between the late 1990s and late 2000s, Livingston had been the fastest growing county in southeastern Michigan. Yet, during this time period, Livingston County still retained abundant natural areas. New development necessitates the clearing and filling of woodlands and wetlands, which perform well established environmental functions. Furthermore, the construction of roads, buildings and parking lots prevents stormwater from filtering into the ground which, in turn, increases flooding and reduces groundwater levels. As land use intensifies, more pollutants are also deposited onto the ground (i.e., trash, eroded soil, landscape chemicals and vehicle fluids) and washed into aquifers and waterways.

In response, several Livingston County communities have enhanced their zoning and/or other ordinances to protect natural resources from degradation associated with new development. New standards have been, or are in the process of being, adopted to

preserve open space, prevent soil erosion, require setbacks from wetlands and waterways, and protect water quality.

Some communities have taken this stewardship one step further by creating environmental review boards. Hamburg Township, for instance, created the Hamburg Environmental Review Board (HERB). This advisory board makes recommendations to the Township Board and Planning Commission regarding environmental issues related to site plan review. HERB also works with the Board and Planning Commission to draft ordinances for protecting the Township's natural resources.

LOCAL ENVIRONMENTAL ORGANIZATIONS

Several environmental organizations are represented in Livingston County, including the Livingston Land Conservancy, Huron River Watershed Council and Sierra Club. The specific goals and objectives of these organizations vary, however, the broader goal of protecting the natural environment is consistent among them all.

LOCAL / REGIONAL PARKS AND RECREATION AREAS

Many small "pocket" and community parks are scattered throughout Livingston County, as well as several large regional and state parks, including: Kensington and Huron Meadows Metroparks; Pinckney, Brighton, and Island Lake State Recreation Areas; and Gregory and Oak Grove State Game Areas. County residents also have access to Lakelands Trail State Park. The trail head for this linear park, which has been converted from an abandoned railroad corridor, is located 1/4 mile north of downtown Pinckney on D-19.

LUTZ COUNTY PARK

In addition, Livingston County operates the Lutz County Park that consists of 300 acres of land within Deerfield Township in the northeast quadrant of Livingston County. The Lutz County Park property was received by Livingston County on May 31, 2005, following the death of Mr. Owen Lutz in June of 2004. Mr. Lutz was born and raised on the property, and ultimately lived on and farmed the land for over 60 years of his life. Approximately 160 acres of the 300 acre park property is active agricultural land (field crops or pasture) that Mr. Lutz leased to tenants. The Lutz homestead including the Lutz house, barns, and outbuildings (on Cohoctah Road) comprise approximately 2 1/2 acres.

The Lutz County Park property provides new opportunities for county residents to experience and appreciate a variety of natural features such as meadows, significant woodlands, forested wetlands, wildlife viewing, and additional land being farmed. The park also contains many interesting structures on the Lutz family farmstead including a farmhouse, summer house, silo, garage, two barns, and miscellaneous outbuildings. In addition to the farmstead there are two (2) structures being rented by the county and two (2) parcels of land that are being leased by the county for farming. Farm leases have been

drafted to insure proper control of farming activities so as not to interfere with recreational activities. Additionally, the tenants have become very beneficial stewards of the land, notifying county administration of any maintenance or security issues as they arise. The income that is generated by these rental and lease agreements is used for operation and maintenance of the park. Livingston County's Building Services Department provides the personnel and equipment to address all operation and maintenance issues regarding these rental and lease agreements.

The northern 100 +/- acres of Lutz County Park is available to public users. This first phase of the park is based largely on Mr. Lutz's vision of the trailway area. The southern portion of the property is not planned for development at this time. The Lutz County Park is much more than just a park with a trail and some picnic tables. Livingston County currently has no combined agriculture and natural resource-themed parks like this recreational opportunity, and use of the park is available without an entrance fee.

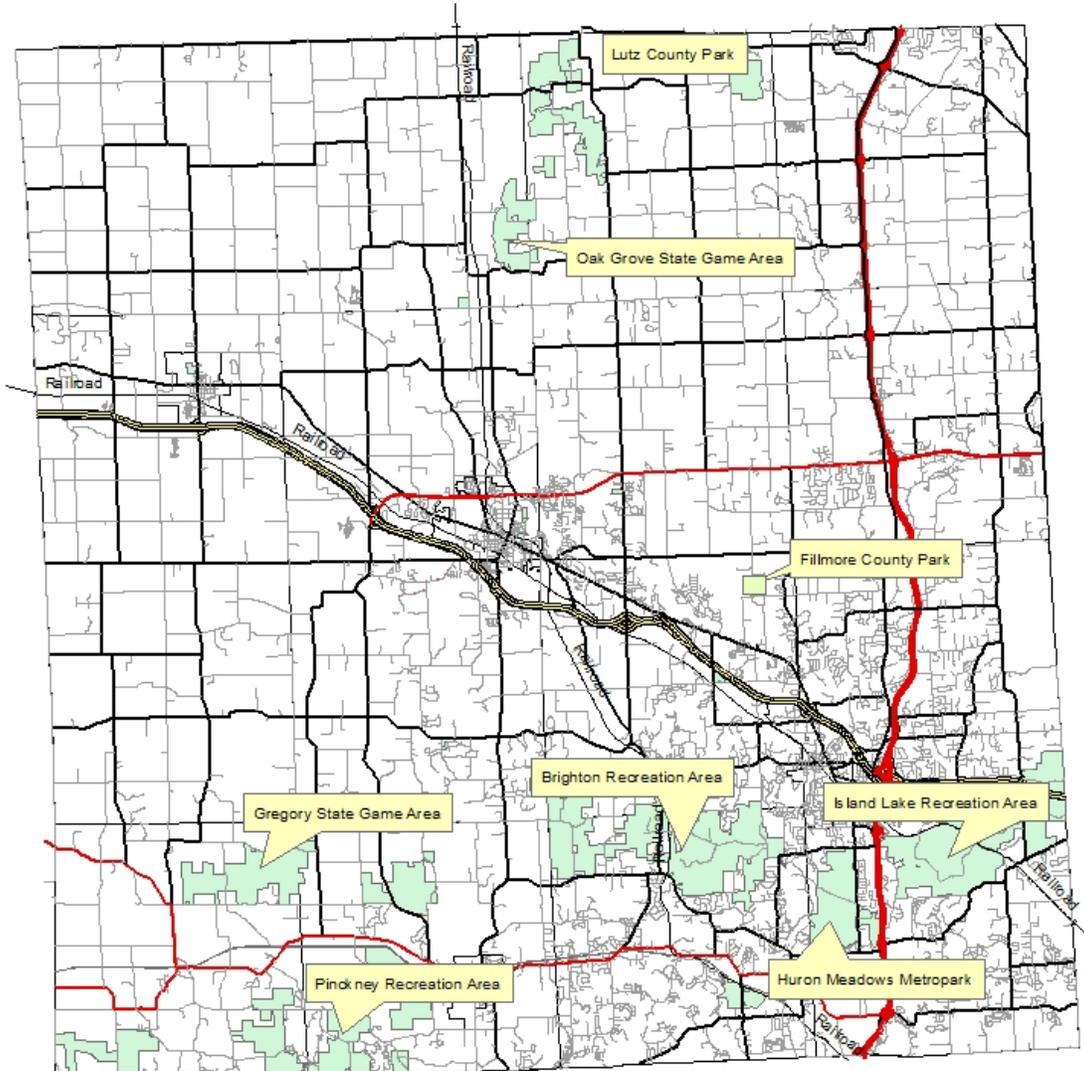
FILLMORE COUNTY PARK

The 198-acre farm bequeathed in 2006 is known as Fillmore County Park after its benefactor Raymond Fillmore. The park is currently undeveloped, therefore it does not have any established entrance or signage identifying the property and it is not yet open to the public. However, in April 2014, the Livingston County Parks and Open Space Advisory Committee applied for a Michigan Natural Resources Trust Fund (MNRTF) in the amount of \$258,000 for planned improvements to the property, as identified by the Fillmore County Park site concept plan developed in late 2013.

Active recreational pursuits are planned for Fillmore County Park according to Mr. Fillmore's wishes. He desired for the entire 198 acres to be retained as open space for active recreation. He wanted the park to be a pleasant setting for the residents of the county to enjoy, whether it is used for baseball diamonds, picnic grounds, or hiking paths. The Livingston County Parks & Open Space Advisory Committee is currently pursuing MDNR Grant funding with the intention of developing the park and establishing baseball and soccer fields on the park property.

Other than the submittal of the grant application, the Advisory Committee has also helped determine where each use should be located on the property and they have studied preliminary site plans that incorporate a shared entrance, concession stand and restrooms for use by users of the park property. Currently it is anticipated that a grant application will be submitted in April 2014 for MDNR funding that will aid in getting development plans progressing for the Fillmore County Park.

Livingston County Parks and Recreation Areas 2013



Prepared by the Livingston County Department of Planning, December 2013

COUNTY INFRASTRUCTURE



The Livingston County Planning Commission in partnership with the Livingston County Department of Planning prepares the County Capital Improvement Plan (CIP) to the County Board of Commissioners. The CIP covers a six year period and identifies projects anticipated by a wide variety of County agencies that affect the County's debt burden. Projects funded directly by

the County through the annual operating budget are also included. Projects inventoried in the CIP have costs in excess of \$50,000 and a useful life greater than three years. Capital expenditures include costs for buildings, land, major equipment, and similar commodities.

WATER SUPPLY

All of Livingston County relies on groundwater for both residential and commercial use. Drinking water, process water, and water used for other purposes are obtained from aquifer systems located at varying depths beneath the ground surface.

The Michigan Department of Environmental Quality (MDEQ) and Livingston County Public Health Department, Environmental Health Division (EHD) regulates the siting, construction, and operation of private wells and public water supply systems. The primary goal of these agencies is to ensure an adequate ground water supply and prevent its contamination. This involves a permit process and the identification of the specific type of supply, public or private. Water supplies are classified according to the number of people served and the number of service connections.

Several communities operate Type I municipal water systems, including the County's two cities (Brighton and Howell) and two villages (Pinckney and Fowlerville), as well as the Townships of Brighton, Genoa, Hartland, Howell, Marion, and Oceola. Although these systems are most often designed to accommodate the water needs of one community, there are agreements in place among some jurisdictions to provide mutual aid to neighboring jurisdictions in the event of a breakdown in water provision.

There are also four cooperative Type I water authorities serving Livingston County. These authorities are:

- 1.) MHOG Water Authority: MHOG, established in 1998, is an acronym for the four participating townships: Marion, Howell, Oceola, and Genoa. The wells for this cooperative water system are located in Marion Township, which is centrally located.
- 2.) Livingston Community Water Authority: This system, established in 2000, serves four communities in the southeast quarter of the County, including the Townships of Brighton, Green Oak, Hamburg, and the City of Brighton.
- 3.) Fonda Island and Briggs Lake Joint Water Authority: This Brighton Township system began serving residents around Fonda Island and Briggs Lake in 2002. Green Oak Township residents around these lakes are also served by the facility.
- 4.) Multi-Lakes Sewer and Water Authority: In 2000, approval was granted to expand this facility, which serves Lyndon Township (in Washtenaw County) and the west side of Patterson Lake in Unadilla Township. This expansion will allow service to be extended to the Village of Gregory (in Unadilla) and the east side of Patterson Lake in Putnam Township.

The Environmental Protection Agency (EPA) lists an additional 49 Type I wells in Livingston County, as of October 2013, that serve specific subdivisions, condominiums, mobile home parks and apartment buildings. Most of these are located in the southeastern portion of the County. The Livingston County Department of Environmental Health performs sanitary surveys for: (1) Type II public non-community supplies; (2) Type III public water supplies; and (3) private wells. The County Health Department enforces state law and the Livingston County Sanitary Code, as it relates to the following:

- Approving sites for well construction
- Issuing well construction permits
- Performing inspections
- Sampling water quality
- Reviewing and maintaining well logs
- Approving water supply for use

There may also be special restrictions specified for subdivisions, based on groundwater conditions and deed restrictions.

WELLHEAD PROTECTION

This program assists local communities utilizing groundwater for their municipal water supply systems in protecting their water source. A WHPP minimizes the potential for

contamination by identifying and protecting the area that contributes water to municipal water supply wells and avoids costly groundwater cleanups.

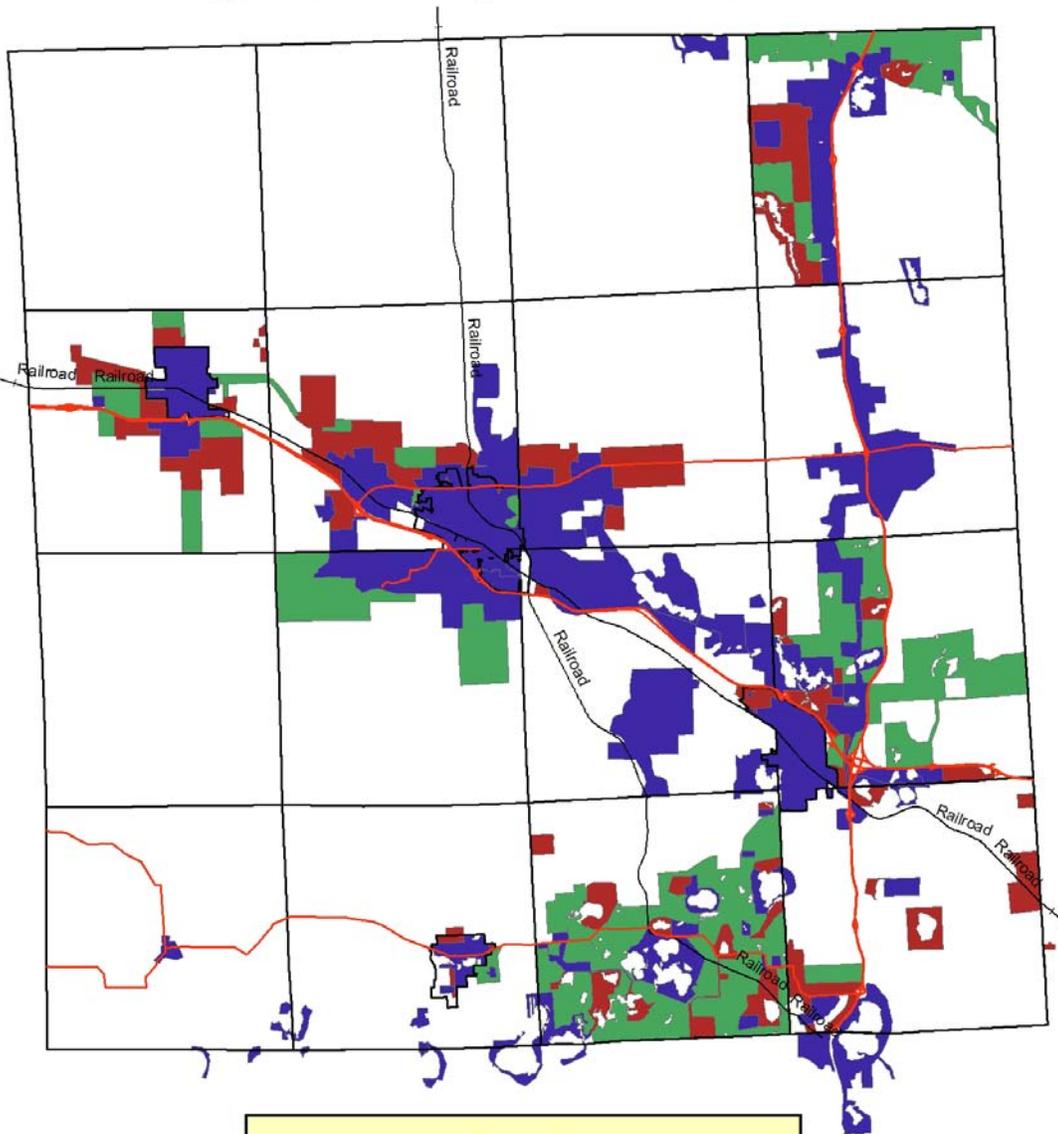
The following Livingston County municipalities are involved in the Michigan Wellhead Protection Program as of 2013:

- City of Brighton
- Village of Fowlerville
- City of Howell
- Livingston County Joint Water Authority
- MHOG-SWATH
- Village of Pinckney
- Fond Island & Briggs Lake Water Authority

SANITARY SEWER

As with water supply, regulation of wastewater treatment systems is a cooperative endeavor involving the MDEQ and Livingston County Health Department, Environmental Health Division. In 2010, there were 37 wastewater treatment plants in 14 political jurisdictions in Livingston County (15 municipal and 22 private). Many private systems have been built for the benefit of a single development, such as a mobile home park or lakeside residential community. Some municipal facilities are shared and collaborative water and wastewater planning is becoming a more frequent management practice.

Livingston County Sewered Areas 2012



Legend

highways	Sewered by 2015
Railroad	Sewered by 2025
Currently Sewered	

Prepared by the Livingston County Department of Planning, November 2013

ON-SITE SEWAGE DISPOSAL

The Livingston County Health Department, EHD regulates underground sewage disposal for all facilities that generate up to 10,000 gallons per day, in accordance with the Livingston County Sanitary Code and MDEQ requirements. The Environmental Health Division On-Site Wastewater Disposal Program includes: evaluations to determine site suitability; system design review; permitting; construction oversight/inspections; and enforcement.

The purpose of the program is to assure that sewage is disposed of in a sanitary manner that prevents surface and groundwater pollution, the spread of disease, and general nuisance conditions.

The number of soil evaluations conducted by Livingston County has been steadily increasing over the last three years and illustrates an increased need for services.

Soil Evaluations Conducted	
Year End 2010	189
Year End 2011	195
Year End 2012	222

TRANSPORTATION

Two major highways cross the County, covering about 34 miles; Interstate 96 and U.S. Highway 23. I-96 connects Livingston County to Detroit, which is about 50 miles east. It travels east/west across the County through the Cities of Brighton and Howell, and the Village of Fowlerville. I-96 then continues westward to Lansing and Grand Rapids. U.S. 23 connects Brighton to Ann Arbor and Toledo to the south and Flint to the north.

M-59 is the primary state trunk line running between Howell and the northern Detroit suburbs in Oakland and Macomb Counties. This trunk line connects I-94 at its eastern boundary (near the City of Mt. Clemens) and to I-96 at its western boundary (near the City of Howell). M-36 is also an east-west trunk line. It originates at U.S. 23 and runs through the County's southernmost townships: Green Oak Charter, Hamburg, Putnam and Unadilla, as well as the Village of Pinckney. Altogether, state trunk lines cover roughly 75 miles of Livingston County.

AIR TRANSIT

Detroit Metropolitan International Airport is about 50 miles southeast of Livingston County's center by freeway. The following airports (shown on the map on the following page) serve private and business aircraft in the local area:

- Livingston County Spencer J. Hardy Airport
<http://www.livgov.com/airport/Pages/default.aspx>
 - Brighton Airport
<http://www.brightonairport.org>
 - Maple Grove Airport
<http://www.airnav.com/airport/65G>
 - Raether Airport
<http://www.airnav.com/airport/4Y1>
 - Richmond Field
<http://www.airnav.com/airport/69G>
- Carriage Lane Airport

As of 2013, Livingston County Spencer J. Hardy Airport had 67,000 aviation takeoffs and landings, and 175 aircraft were based there.

RAIL SERVICE

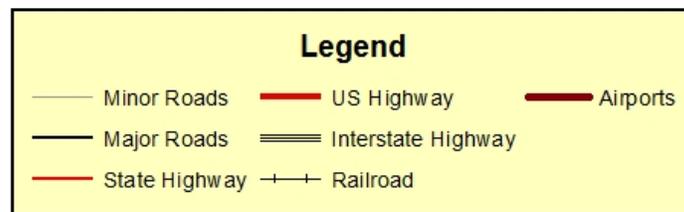
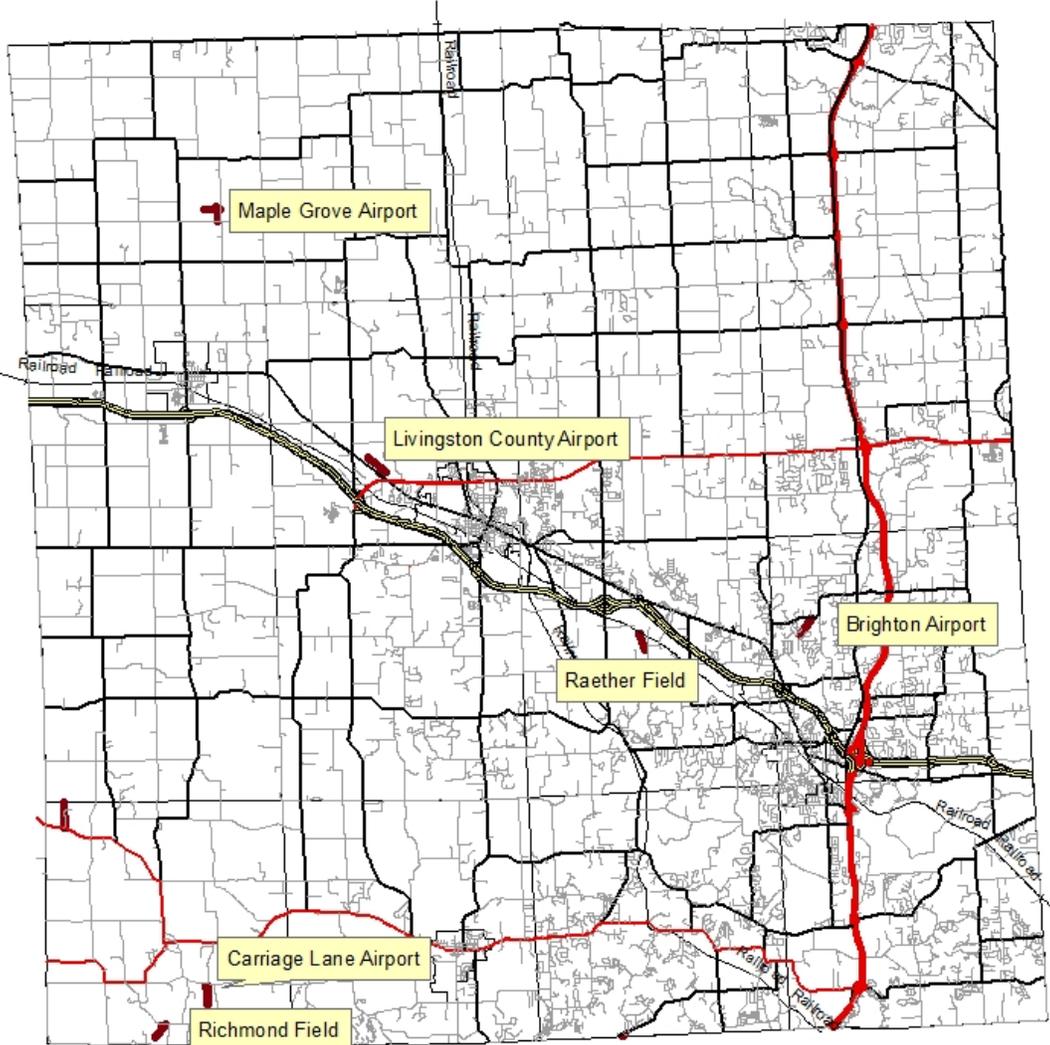
Livingston County's rail network plays a vital role in the transfer of bulk commodities, manufacturing components, and finished products to a variety of industries across the state. There is a total of 69 miles of active rail in Livingston County, with service provided by two major freight carriers: CSX Transportation Inc. and Great Lakes Central Railway (formerly T&SB).

The CSX Railway, which runs on old Chesapeake and Ohio tracks, serves a large part of the Great Lakes region, including Lansing, Detroit, Toledo, and Cleveland. In March 2006 the Tuscola and Saginaw Bay Railway was purchased by Federated Railways, Incorporated, and changed their name to Great Lakes Central Railroad (GLCR). With Ann Arbor at its eastern terminus and Owosso as its home office, the GLCR runs diagonally across Michigan's Lower Peninsula, eventually splitting off into three northern branches and terminating at its westernmost point near Yuma, Traverse City and Petoskey. In the Spring of 2007, the GLCR announced that it will begin providing commuter rail service between Howell and Ann Arbor. This commuter rail service became known as the WALLY and is still under consideration as of October 2013. A lack of grant funding has been the primary issues behind the delay of this important rail feature for the Livingston County area.

WATER TRANSIT

The ports of Detroit are less than a one-hour drive from Livingston County. Because of Detroit's location on the Great Lakes waterway these ports provide water shipping to worldwide markets. Combined, they handle over 1.5 million tons of cargo into and out of the Detroit metropolitan area annually.

Livingston County Transportation Network 2013



Prepared by the Livingston County Department of Planning, December 2013

UTILITIES

Consumers Power is the only natural gas provider in the County with DTE Energy being the only electric provider. AT&T, Comcast along with other companies provide local, long distance, wireless, and high speed internet access to Livingston County. No longer can infrastructure only be considered, but high speed internet and wireless also play a critical role when talking about economic development in the county communities. More and more businesses and residents alike are giving thought to the creation of places that utilize these modern technologies to start businesses and improve communications with their customer base.

DRAINAGE

The county generally consists of gently sloping terrain, with the topography being generally less pronounced in the western half of the county and generally more pronounced in the eastern half of the county. Due to differing topography and soil conditions, drainage needs in the western half of the county have historically served more of an agricultural support focus. Of the 400 miles of established county drains in Livingston County, the majority of county systems serving multiple properties in rural areas are located in the western half of the county. Of the approximately 100 miles of enclosed drain maintained by the Drain Commissioner, the vast majority of the 100 systems serving residential subdivisions are located in the eastern half of the county. The majority of the drainage infrastructure in the county (over 97%) is private. The County Drain Commissioner's office only maintains what's been given to the County through special assessment districts.

SOLID WASTE

Each Michigan County is mandated by law to have a solid waste management plan that contains: (1) an estimate of the amount of waste that will be generated over a ten year period; and (2) a planned disposal method for this waste. The Livingston County Department of Public Works, Solid Waste Program is responsible for preparing and implementing the County's Solid Waste Management Plan, in accordance with Part 115 of Act 451, as amended. The plan was developed to meet three primary goals:

1. Develop and implement an integrated solid waste management program which protects public health by maximizing environmental and economic benefits.
2. Develop and implement mechanisms to control illegal dumping by providing incentives and education to prevent illegal dumping from occurring.
3. Build an educated public where citizens are informed about and understand solid waste management issues and concerns.

While, currently, Livingston County has no landfills that are accepting waste, there are a number of facilities in the area that handle most of the solid waste generated by residential,

commercial or industrial uses. The County DPW, Solid Waste Program publishes a Waste Reduction Guide, which contains a comprehensive directory of organizations that accept many items for reuse or recycling.

If an item in need of disposal cannot be reused or recycled, there are eight trash hauling companies in the County that may either accept the item curbside or provide roll-off containers for items like construction debris. Some local units of government have contracts with a single hauler to provide service to the entire municipality. Property owners should contact their city, village, or township to determine if they are required to secure trash hauling on their own.

Items that cannot be reused or recycled can be taken to the nearest landfill, transfer station, or processing facility. Property owners should call these facilities for hours, prices, and restrictions.

Waste Management – Williamston, Michigan, 517-655-4106

Len's Rubbish Processing Facility – Pinckney, Michigan, 810-231-3379

INDUSTRIAL PARKS

Livingston County has a significant industrial base, much of it related to the automotive industry. As a result, industrial and business parks have proved to be a successful economic development tool. However, many County parks do not have the utilities necessary to attract industries or be certified by the State of Michigan through the Michigan Economic Developers Association and the Michigan Economic Development Corporation (<http://www.michiganbusiness.org/cm/files/fact-Sheets/CertifiedBusinessParks.pdf>)

SCHOOLS

Livingston County is home to five public school districts: Brighton, Hartland, Fowlerville, Howell, and Pinckney. It also includes portions of the Stockbridge, South Lyon, and Whitmore Lake School districts and several smaller rural school districts. The Howell School District is the largest in the County with over 7,000 students, kindergarten through high school, followed by the Brighton School District with close to 7,000 students. Charyl Stockwell Academy (CSA) is a high performing public school district that uses state of the art instructional best practices in a K-12 school setting. The district is made up of three schools: elementary, middle and college preparatory. In 2013-14, the student count at CSA was approximately 1,000 students. In addition, there are several parochial schools in the County, the largest of these being St. Patrick's Catholic School.

There are also a number of institutions of higher learning in Livingston County available to residents and the general public. Some of these facilities include:

- Cleary University, Livingston County Campus
- Lansing Community College, Livingston County Center
- Washtenaw Community College, Northern Center
- Washtenaw Community College, Pinckney Campus-Pathfinders School
- Central Michigan University, Howell Program
- Eastern Michigan University, Brighton Campus
- Livingston Regional Michigan Technical Education Center (M-TEC)- operated by Mott Community College

All facilities, with the exception of M-TEC, function as either alternative campuses or distance learning centers for larger parent institutions. These institutions offer coursework leading toward either a two year associates degree, professional certification, or fulfillment of core requirements necessary for transfer to a four year college or university. The County is also within 30 miles of several large universities including Eastern Michigan University, Michigan State University, and the University of Michigan.

Livingston County Schools



Legend		
School		Fowlerville
District		Hartland
		LESA
		Howell
		Brighton
		Pinckney

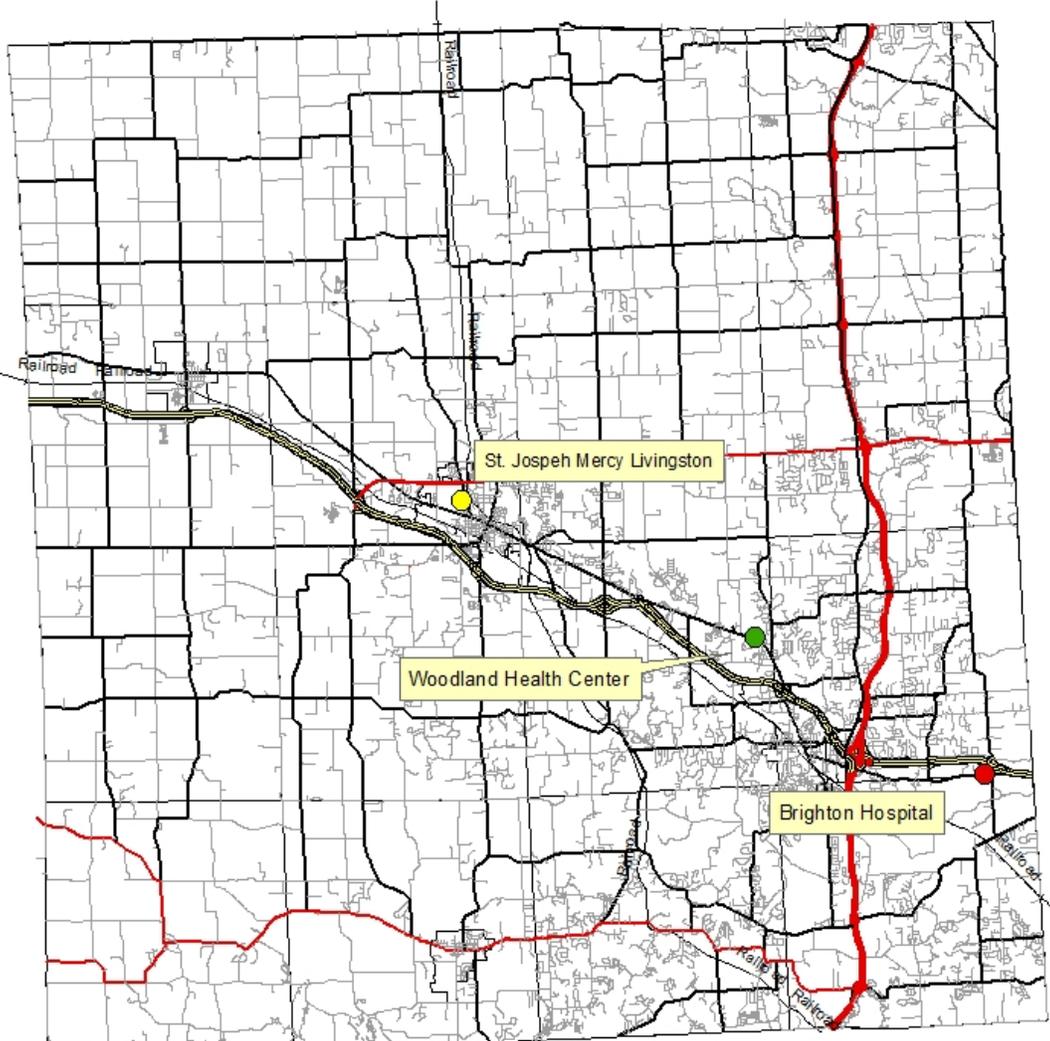
Prepared by the Livingston County Department of Planning, November 2013

HOSPITALS AND CLINICS

Livingston County is served by one major hospital (St. Joseph Mercy Livingston Hospital in Howell), two large medical clinics (Brighton Hospital and St. Joseph Mercy Woodland Health Center), and numerous other clinics and doctors' offices including a new assisted living facility (Wellbridge in Genoa Township). The nearest out of county medical centers are located in Lansing, Flint, or Ann Arbor. Livingston County hospitals include the following:

- St. Joseph Mercy Livingston Hospital, 620 Byron Road, Howell
- Brighton Hospital, 12851 E. Grand River Ave., Brighton
- Woodland Health Center, 7575 W. Grand River, Brighton
- Urgent Care (McAuley-McPherson), 8580 W. Grand River, Brighton

Livingston County Hospitals and Urgent Care Facilities 2013



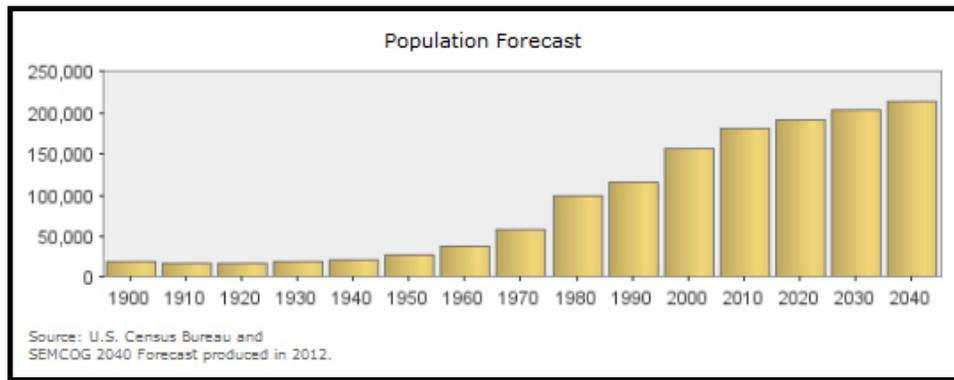
Prepared by the Livingston County Department of Planning, December 2013



COUNTY POPULATION PROFILE

Assessing the character of Livingston County’s population is essential to producing an appropriate and functional economic development plan. The primary data sources for the information in this section are the 2000 and 2010 U.S. Censuses, the Southeast Michigan Council of Government (SEMCOG), and the Michigan State Demographer’s Office.

POPULATION TRENDS AND FORECAST



Livingston County Population Past Trends and Forecasts							
Year	Population	Numeric Change	Percent Change	Year	Population	Numeric Change	Percent Change
1900	19,664	---	---	2000	156,951	41,306	35.7%
1910	17,736	-1,928	-9.8%	2010	180,967	24,016	15.3%
1920	17,522	-214	-1.2%	2020	192,116	11,149	6.2%
1930	19,274	1,752	10.0%	2030	204,704	12,588	6.6%
1940	20,863	1,589	8.2%	2040	214,323	9,619	4.7%
1950	26,725	5,862	28.1%				
1960	38,233	11,508	43.1%				
1970	58,967	20,734	54.2%				
1980	100,289	41,322	70.1%				
1990	115,645	15,356	15.3%				

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

The chart and table above provide an overview of Livingston County past population trends and forecasts.

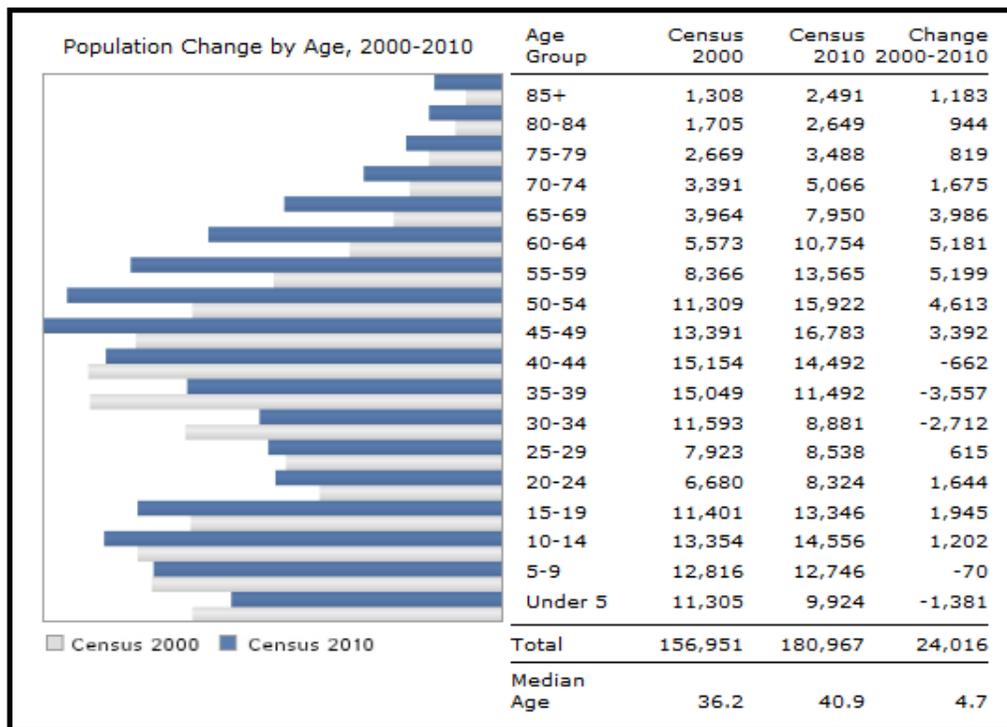
The County experienced tremendous growth between 1970 through 2000. The highest rate of growth during that time period occurred between 1970 and 1980, when the County

population grew 70 percent over the decade (~7 percent annually). After experiencing a dramatic slow down between 1980 and 1990 (from 7 percent annual growth to 1.5 percent annually), population growth picked back up between 1990 to 2000 (from 1.5 percent annually to nearly 3.6 percent annually).

The table and chart includes population forecasts provided by the Southeast Michigan Council of Government (SEMCOG) through 2040. The data shows that the county should expect population growth between 2010 and 2040 to increase at a very modest rate, less than 1 percent annually.

POPULATION DISTRIBUTION BY AGE GROUP: 2000-2010

The chart below provides an overview of county population by age cohorts for the last two census periods.



Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

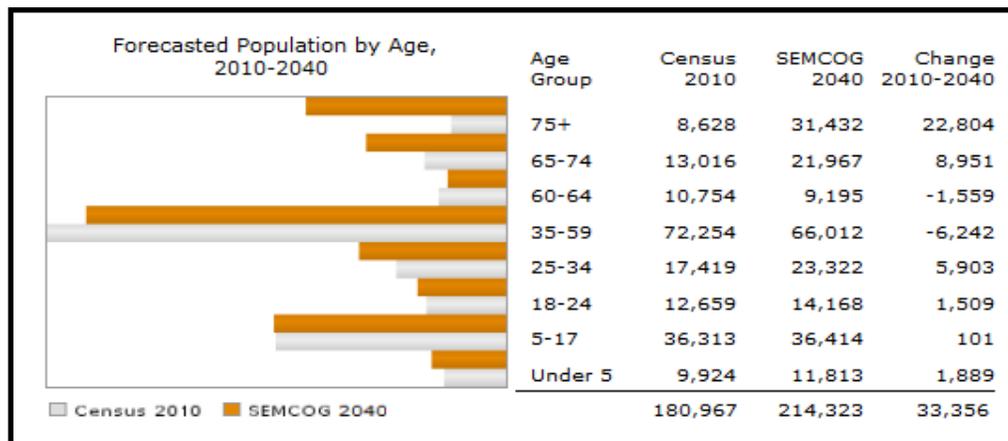
As the chart indicates, the majority of the county's population in 2010 were within the ages 45 to 49 (9.3 percent of total population) and ages 50 to 54 (8.8 percent of total population). The age cohorts that experienced the largest numeric growth between 2000 and 2010 was the age 55 to 59 (5,199 persons or accounting for 21.6 percent of the total percent change experienced by the county over the period) and age 60 to 64 (5,181 persons or 21.5 percent). The smallest population cohorts in the county in 2010 were age 85 and over (2,491 persons or 1.4 percent of total population) and age 80 to 84 (2,649

persons or 1.5 percent of total population). For school age children cohorts - ages 5 to 19 – that age group was the smallest in 2010, accounting for 7 percent of total population. The age 15 to 19 (7.4 percent) and age 10 to 14 (8.0 percent) cohorts were only slightly larger in comparison. The under age 5 cohort (5.5 percent of total population) was the smallest of the child-age population cohorts in the county.

The age cohort that experienced the largest decline in population over the period was the age 35 to 39 cohort, which saw a decline of 3,557 persons (23.6 percent decline). The decline within this age cohort was followed closely by the decline in the age 30 to 34 cohort (2,712 persons or 23.4 percent decline). The age 5 and under age cohort experienced the third largest decline in population at 1,381 persons (12.3 percent decline).

POPULATION FORECAST BY AGE

The chart below provides a forecast of the county's population from 2010 through 2040, as determined by the Southeast Michigan Council of Governments (SEMCOG).



Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

As the chart indicates, changes in the aging population at the National levels should also be mirrored at the county level. The age group expected to experience the largest increase in population over the period will be the age 75 and over, with a 22,804 persons increase (264 percent increase). While the age 35 to 59 cohort is expected to remain the largest age group in the county over the period, it will also experience the most dramatic decrease in overall population over the period, with a loss of 6,242 persons (8.6 percent decrease). The only other age group expected to lose population over the time period is the age 60 to 64 cohort, with a loss of 1,559 persons (14.5 percent decrease). All other age cohorts are expected to experience an increase in population over the period.

CHILD AND SENIOR POPULATION

The table below provides an overview of the change in population between 2000 and 2010 for children under age 18 and the senior population, age 65 and over.

Senior and Youth Population	Census 2000	Census 2010	Pct Change 2000-2010	SEMOG 2040	Pct Change 2010-2040
65 and over	13,037	21,644	66.0%	53,399	146.7%
Under 18	45,125	46,237	2.5%	48,227	4.3%
5 to 17	33,820	36,313	7.4%	36,414	0.3%
Under 5	11,305	9,924	-0.9%	11,813	19.0%

Note: Population by age changes over time because of the aging of people into older age groups, the movement of people, and the occurrence of births and deaths.

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

As the table indicates, the age 65 and over cohort increased by 66 percent between 2000 and 2010 (6.6 percent average growth rate annually). This growth trend is expected continue between 2010 and 2040, though, at a somewhat reduce rate (4.9 percent average annual growth). In the under age 18 categories, the age 5 to 17 cohort experienced the largest percent increase in population (7.4 percent). At the other end of the spectrum, the under age 5 cohort experienced the largest percent decrease in population over the decade (nearly 1 percent). However, over the next three decades, the under age 5 population cohort is expected to see the largest percent growth within the under 18 age category, with a 0.6 percent average growth rate annually.

RACE/ETHNIC DISTRIBUTION

The table below provides an overview of race and ethnicity in the county for the years 2000 and 2010.

Race and Hispanic Origin	Census 2000		Census 2010		Percentage Point Chg 2000-2010
Non-Hispanic	154,998	98.8%	177,507	98.1%	-0.7%
White	151,170	96.3%	172,513	95.3%	-1.0%
Black	716	0.5%	776	0.4%	-0.0%
Asian	896	0.6%	1,412	0.8%	0.2%
Multi-Racial	1,448	0.9%	1,978	1.1%	0.2%
Other	768	0.5%	828	0.5%	-0.0%
Hispanic	1,953	1.2%	3,460	1.9%	0.7%
Total Population	156,951	100.0%	180,967	100.0%	0.0%

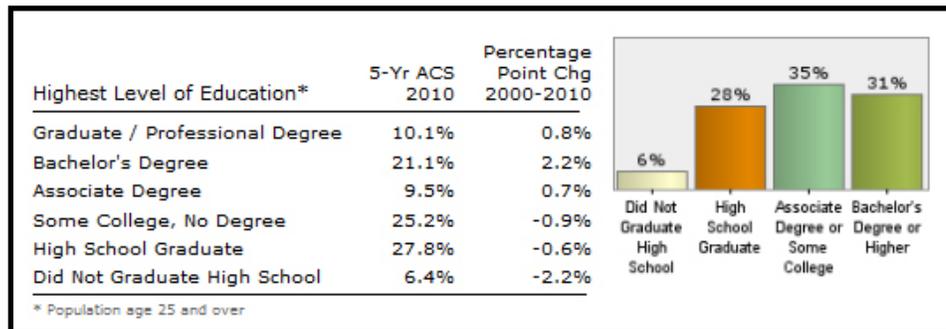
Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

During the last two Census recording periods, of the Livingston County responses to race, the majority of people (98 percent) responded that they were White. The remaining

population was distributed as follows: Black or African American (0.5 percent in year 2000, 0.4 percent in year 2010); Asian (0.6 percent in 2000, 0.8 percent in 2010); and multi-racial (0.9 percent in 2000, 1.1 percent in 2010). County residents that identified themselves as Hispanic or Latino, who can be of any race, equaled 1.2 percent in 2000 and 1.9 percent in 2010 respectively.

EDUCATION

The table and chart below provide an overview of the level of education distribution in the county as reported in the 2000 and 2010 U.S. Census.



Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

The largest education category in the county in 2010 were high school graduates, at 27.8 percent of the population age 25 and over. This represented a 0.6 percent decrease over the 2000 figure. The next largest education category were those that possessed some college experience, but hadn't attained a degree, at 25.2 percent. Here too, the 2010 figure represents a decrease over the 2000 figure (0.9 percent decrease). The third largest education category were those that had attained a bachelor's degree, 21.1 percent, followed by those with graduate or professional degrees at 10.1 percent. The percent of the county population with bachelor's degrees increased between 2000 and 2010 by 2.2 percent, as did the percentage of those with graduate degrees, although to a lesser extent at 0.8 percent. Only 6.4 percent of the county's population reported not having graduated high school. This figure represented a favorable 2.2 percent decrease over the 2000 figure.



COUNTY HOUSING AND HOUSEHOLDS PROFILE

Although population is an important factor to consider when contemplating the potential future impacts upon a community, it is the built environment, or the housing stock, that will accommodate this future population growth and have the most impact on future land use.

HOUSEHOLDS and PERSONS PER HOUSEHOLD

The table below provides an overview of Livingston County households and household size for the period 2000 to 2010.

Population and Households	Census 2010	Change 2000-2010	Pct Change 2000-2010	SEMCOG Dec 2012	SEMCOG 2040
Total Population	180,967	24,016	15.3%	183,113	214,323
Group Quarters Population	1,152	-529	-31.5%	1,180	1,358
Household Population	179,815	24,545	15.8%	181,933	212,965
Housing Units	72,809	13,890	23.6%	73,255	-
Households (Occupied Units)	67,380	11,996	21.7	69,183	82,223
Residential Vacancy Rate	7.5%	1.5%	-	5.6%	-
Average Household Size	2.67	-0.13	-	2.63	2.59

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2012

As the table indicates, there were 72,809 total housing units in the county in 2010. This figure represents a 23.6 percent increase over the number of units reported in 2000. There were 67,380 households in the county in 2010. This represented a 21.7 percent change over the figure for 2000. The residential vacancy rate in county in 2010 was 7.5 percent, up 1.5 percent over the figure for 2000. The average household size in 2010 was 2.67 persons, up from 2.54 in 2000¹.

The number of household's in the county is expected to reach 82,223 by the year 2040, according to SEMCOG forecasts. The average household size is expected to be approximately 2.59 persons per unit.

¹ In comparison, the 2000 Census figure for persons per household was 2.80, the 1990 figure was 2.94 and in 1980, the figure was 3.15 persons per household.

HOUSEHOLD COMPOSITION

The table below provides an overview of Livingston County household types as derived from 2000 and 2010 Census data.

Household Types	Census 2000	Census 2010	Pct Change 2000-2010
With seniors 65+	9,090	15,127	66.4%
Without seniors	46,294	52,253	12.9%
Two or more persons without children	22,734	29,622	30.3%
Live alone, 65+	3,010	4,877	62.0%
Live alone, under 65	6,462	8,699	34.6%
With children	23,178	24,182	4.3%
Total Households	55,384	67,380	21.7%

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

The table indicates that of the total 67,380 households in the county in 2010, 77.5 percent were households without a senior-aged (65 years or over) person. There was a 21.7 percent change in the number of total households in the county between 2000 and 2010. Households without seniors increased by 12.9 percent between 2000 and 2010, however, households with at least one senior increased by over 66 percent between 2000 and 2010.

The majority of households in the count in 2010 were those with two or more persons, however, without children present at 29,622 or 44 percent of the total. This figure increased over the 2000 Census figure by 30 percent. The next largest category, households with children, numbered 24,182 or 35.9 percent of the total. The 2010 Census figure was a modest increase over the 2000 Census figure at a little over 4 percent increase. The third largest household category were those households with single occupants under the age of 65, with 8,699 or 12.9 percent of the total. This figure was a 34 percent increase over the 2000 figure. The smallest household category in 2010 were those of single occupants age 65 and over at 4,877 households, or 7.2 percent of the total for the county. While this was the smallest household category, it was the category that realized the largest growth between 2000 and 2010, at 62 percent.

HOUSING UNITS and HOUSING STOCK

The table below provides an overview of Livingston County housing stock characteristics as derived from 2000 and 2010 U.S. Census data.

Housing Type	Census 2000	5-Yr ACS 2010	Change 2000-2010	New Units Permitted 2010-2013
Single Family Detached	48,304	58,322	10,018	849
Duplex	953	739	-214	0
Townhouse / Attached Condo	2,181	3,862	1,681	37
Multi-Unit Apartment	3,716	5,298	1,582	48
Mobile Home / Manufactured Housing	3,653	4,330	677	0
Other	112	0	-112	-
Total	58,919	72,551	13,632	934
Units Demolished				- 51
Net (Total Permitted Units - Units Demolished)				883

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

As the table indicates, there were 72,551 housing units in the county in 2010. This figure represented an increase of 13,632 units over the 2000 figure (23.1 percent increase). The largest housing category in the county are single family detached residences. This land use type accounts for nearly 82 percent of all housing types in the county (58,322 units). Between 2000 and 2010, there was an increase of 10,018 units (20.7 percent increase). The next largest residential category in the county was multi-unit apartments, with 5,298 units (7.3 percent of total).

HOUSING TENURE

The table below provides an overview of housing tenure characteristics as derived from 2000 and 2010 U.S. Census data.

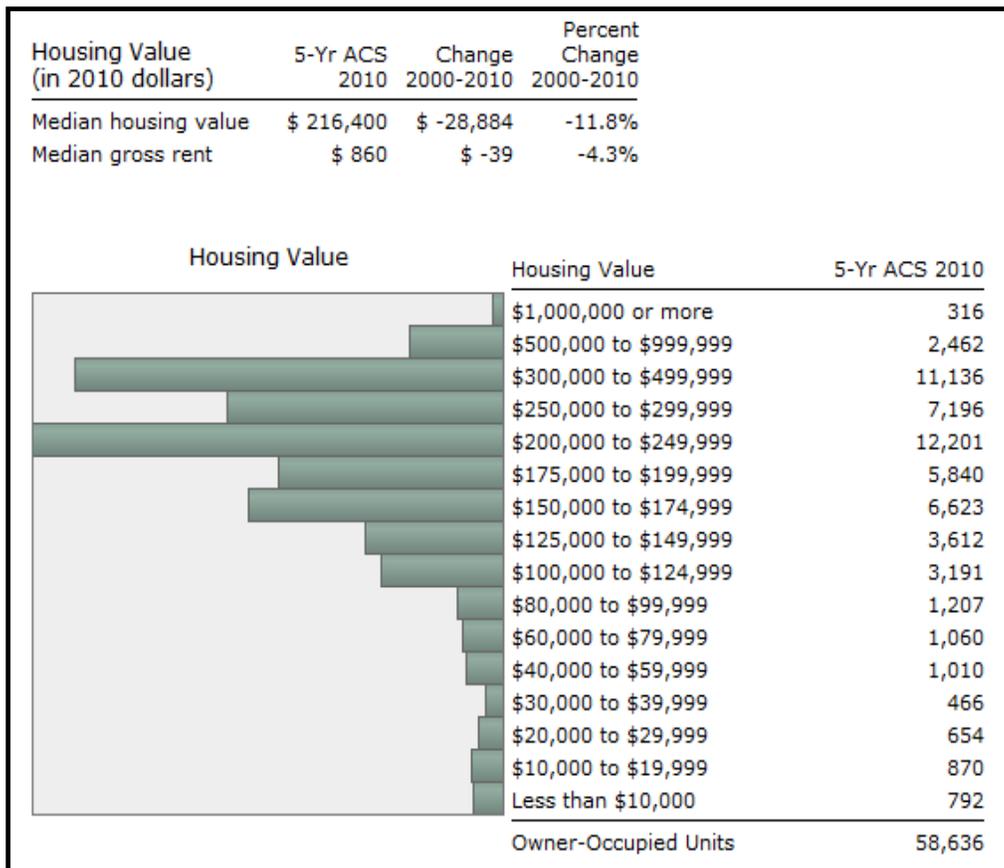
Housing Tenure	Census 2000	Census 2010	Change 2000-2010
Owner occupied	48,757	57,503	8,746
Renter occupied	6,627	9,877	3,250
Vacant	3,535	5,429	1,894
Seasonal/migrant	1,570	1,799	229
Other vacant units	1,965	3,630	1,665
Total Housing Units	58,919	72,809	13,890

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

According to the table, there were a total of 58,919 housing units in 2000. The number of housing units increased to 72,809 units in 2010 (13,890 units or a 23.5 percent increase). In 2000, 82.7 percent of housing units in the county were owner occupied. That figure dropped slightly in 2010 to 78.9 percent. Renter-occupied housing in the county account for 11.2 percent of all housing units in 2000. This figure increased slightly to 13.6 percent in 2010. Vacant housing units accounted for 6 percent of all housing units in the county in 2000. By 2010, this figure had risen slightly to 7.5 percent. Of the total number of vacant units in 2000, 44 percent were seasonally vacant, most likely by those that are only part-time residents of the county, having a second home elsewhere. Seasonal vacancies accounted for 33.1 percent of all vacant units in 2010.

HOUSING VALUE

The table below provides an overview of estimated housing values as derived from 2000 and 2010 U.S. Census data.



Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

According to the table, median housing value was \$216,400 in 2010. According to the data, this was an 11.8 percent decline over the 2000 figure (approx. \$245, 280). Over the total 58,636 housing units in the county in 2010, the majority (20.8 percent) had values between \$200,000 and \$249,999. The next largest category were those with values of \$300,000 to \$499,999 (19 percent). There were a total of 316 units within the county with estimated values of \$1,000,000 or more.

When comparing median housing values with those of the other six member communities of the Southeast Michigan Council of Governments (SEMCOG) region, Livingston County fares very well in this category:

<u>2010 Housing Values – SEMCOG Region</u>	
Livingston County -	\$216,400
Washtenaw County -	\$216,200
Oakland County -	\$204,300
Monroe County -	\$161,800
Macomb County -	\$157,000
St. Clair County -	\$150,300
Wayne County (including City of Detroit) -	\$121,100

Source: 5-year ACS, U.S. Census and SEMCOG, 2010

MEDIAN GROSS RENT

According to the table below, median gross rent in the county was \$860 in 2010, down from \$899 in 2000 (4.3 percent decrease). When comparing median gross rent rates in the county with those of the other six member communities of the SEMCOG, Livingston County fares well in this category also.

<u>2010 Median Gross Rent – SEMCOG Region</u>	
Oakland County -	\$871
Washtenaw County -	\$866
Livingston County -	\$860
Wayne County (including City of Detroit) -	\$759
Macomb County -	\$752
Monroe County -	\$733
St. Clair County -	\$691

Source: 5-year ACS, U.S. Census and SEMCOG, 2010



COUNTY LABOR FORCE PROFILE

Assessing the character of Livingston County's labor force is essential to producing an appropriate and functional economic development plan. The primary data sources for the information in this section are the 2000 and 2010 U.S. Censuses, the Southeast Michigan Council of Government (SEMCOG), the Michigan State Demographer's Office, and The Michigan State Bureau of Labor Market Information and Strategies Initiatives.

LABOR FORCE BY DEMOGRAPHIC GROUP

The table below provides an overview of Livingston County civilian labor force data for the period 2006 to 2010.

Civilian Labor Force by Demographic Group – 2006 - 2010 (Average)				
Demographic Group	Civilian Labor Force	Total Employment	Total Unemployment	Unemployment Rate
Total	96,457	88,094	8,363	8.7 percent
Male 16+	52,283	47,286	4,997	9.6 percent
16-19	2,672	1,902	770	28.8 percent
20-24	3,611	2,983	628	17.4 percent
25-54	36,203	33,504	2,699	7.5 percent
55-64	8,055	7,387	668	8.3 percent
65 Plus	1,742	1,510	232	13.3 percent
Female 16+	44,174	40,808	3,366	7.6 percent
16-19	2,657	2,230	427	16.1 percent
20-24	3,207	2,952	255	8.0 percent
25-54	30,526	28,354	2,172	7.1 percent
55-64	6,497	6,044	453	7.0 percent
65 Plus	1,287	1,228	59	4.6 percent
Race				
White	93,586	85,401	8,185	8.7 percent
Black/African American	310	288	22	7.1 percent
Native American	361	333	28	7.8 percent
Asian/Pacific Islander	785	758	27	3.4 percent
Some Other Race	533	503	30	5.6 percent
Two or More Races	882	811	71	8.0 percent
Ethnicity				
Hispanic	1,605	1,460	145	9.0 percent

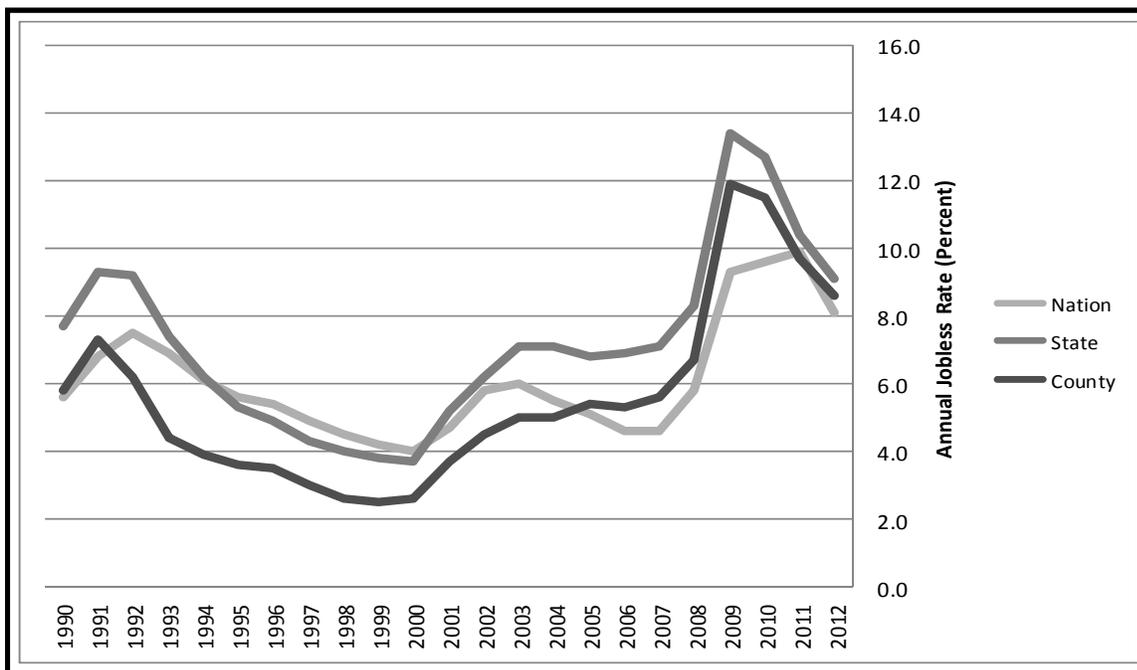
Source: U.S. Census Bureau American Factfinder, 2010; Livingston County Michigan Works, 2013.

According to the table, there were 96,457 persons in the county aged 16 years and older which constituted the average county labor force between 2006 and 2010. Of that figure, an average of 88,094 persons were actually employed during this period. Additionally, the county's unemployment rate during this time period averaged approximately 8.7 percent.

For both genders, the age cohorts with the highest unemployment figure was age 16 to 19 years, with the figure for males at 28.8 percent and females at 16.1 percent. The high figure for this age cohort isn't that surprising, when you consider that it could be most likely attributable to young adults this age being involved in assorted high school activities such as sports and club functions. The unemployment rates for all other age cohorts weren't that different individually as that of the overall rate for the entire county.

COUNTY UNEMPLOYMENT

The graph below provides an overview of historic unemployment rates between the years 1990 to 2012.



Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

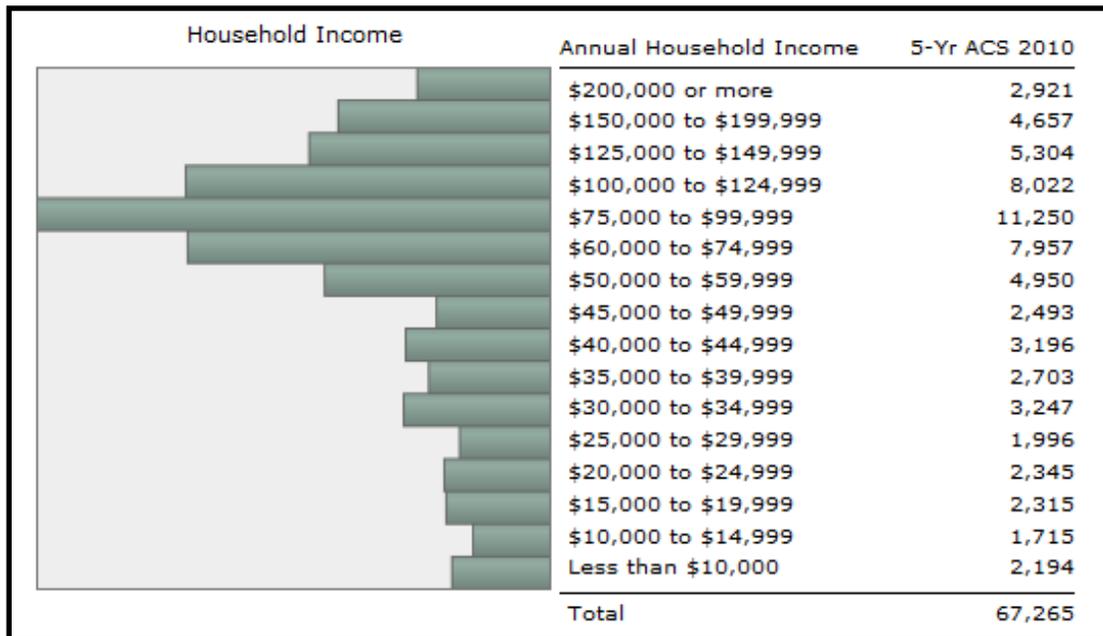
The graph indicates that the county unemployment rate has consistently been lower than that in the State over this period. The county rate during this time period typically ran between one and two percent lower than the State. Additionally, during the period 1991 until 2005, the County unemployment rate was also lower than the National rate.

COUNTY INCOME

The tables below provide an overview of Livingston County income characteristics for the period 2000 and 2010.

Income	5-Yr ACS 2010	Change 2000-2010	Percent Change 2000-2010
Median Household Income (in 2010 dollars)	\$ 72,129	\$ -16,088	-18.2%
Per Capita Income (in 2010 dollars)	\$ 31,609	\$ -5,129	-14.0%

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010



Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

According to the data above, the median household income in Livingston County was \$72,129 in 2010. This was an overall 18.2 percent decrease as compared with the 2000 figure (\$88,217). Thirty-three percent of households in the county had incomes below \$50,000. The majority of households in the county had incomes of between \$60,000 and \$124,999 (40.5 percent).

When comparing the median household income in Livingston County with that of the other six counties in the SEMCOG region, Livingston County's is the highest. This data is present in the table on the following page.

2010 Median Household Income – SEMCOG Region

Livingston County -	\$72,129
Oakland County -	\$66,390
Washtenaw County -	\$59,065
Monroe County -	\$55,366
Macomb County -	\$53,996
St. Clair County -	\$49,120
Wayne County (including City of Detroit) -	\$42,241

Source: 5-year ACS, U.S. Census and SEMCOG, 2010

Livingston County's per capita income in 2010 was \$31,609. This figure was an overall decrease of \$5,129 (14.0 percent) compared to the 2000 figure (\$36,738 – 2000). When comparing the per capita income in Livingston County with that of the other six counties in the SEMCOG region, Livingston County's is the second highest in the region. This data is present in the table below.

2010 Per Capita Income – SEMCOG Region

Oakland County -	\$36,138
Livingston County -	\$31,609
Washtenaw County -	\$31,316
Macomb County -	\$26,524
Monroe County -	\$25,520
St. Clair County -	\$23,828
Wayne County (including City of Detroit) -	\$22,125

Source: 5-year ACS, U.S. Census and SEMCOG, 2010

POVERTY RATE

The table below provides an overview of Livingston County poverty statistics for the period 2000 and 2010.

Poverty	Census 2000		5-Yr ACS 2010		Percentage Point Chg 2000-2010
Persons in Poverty	5,228	3.4%	11,158	6.2%	2.8%
Households in Poverty	1,899	3.4%	4,009	6.0%	2.5%

Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

According to the data, in 2000 there were 5,228 persons in poverty. This figure represented 3.4 percent of the total county population for the year 2000. By 2010, there were 11,158 persons in poverty. This figure represented 6.2 percent of the total population in the county in 2010. In 2000 there were 1,899 households in poverty, which represented 3.4 percent of the total county households. By 2010 there were 4,009 households in poverty, which represented 6.0 percent of total county households.

GEOGRAPHIC DISTRIBUTION OF LABOR FORCE

The table below provides an overview of the distribution Livingston County's labor force for the periods 2010 to 2040.

According to the Southeast Michigan Council of Governments (SEMCOG) 2040 Regional Forecast over 62 percent of the county's labor force were located in the southeast quadrant of the County (42,828 workers), compared to 26 percent in the northwest quadrant (17,982 workers), 9 percent in the northeast quadrant (6,008 workers), and 3 percent southwest quadrant (2,045 workers) in 2010. Genoa Township had the most workers in the township as compared to all other townships (16.5 percent of total labor force), followed by Brighton Charter Township (9,597 workers – 13.9 percent), and Green Oak Charter Township (8,343 workers – 12.1 percent) in 2010.

DISTRIBUTION OF LABOR FORCE FORECASTED JOBS – SEMCOG 2040 FORECAST		
	Number of Workers 2010	Forecasted Number of Workers 2040
Livingston County	69,057	89,727
Brighton Charter Township	9,597	14,368
Cohoctah Township	104	174
Conway Township	16	17
Genoa Charter Township	11,430	14,029
Deerfield Township	305	353
Green Oak Charter Township	8,343	9,962
Hamburg Township	2,656	3,364
Handy Township	818	1,050
Hartland Township	4,784	6,206
Howell Township	4,136	4,953
Iosco Township	119	132
Oceola Township	564	804
Marion Township	790	1,109
Putnam Township	577	909
Tyrone Township	355	579
Unadilla Township	184	289
City of Brighton	10,812	14,927
City of Howell	11,330	14,040
Village of Fowlerville	1,578	1,904
Village of Pinckney	559	558

Source: SEMCOG Regional Forecast, 2012

The City of Howell had the most workers for cities and villages in the county in 2010 with 11,330 workers (16.4 percent), followed by the City of Brighton (10,812 workers, or 15.7 percent), the Village of Fowlerville (1,578 workers, or 2.3 percent) and the Village of Pinckney (559 workers, less than 1 percent)

According to the data, the SEMCOG forecast shows that by the year 2040 it's expected that the county's labor force will increase to 89,727 workers. The size of Brighton Charter Township's local labor force (14,368 workers, or 16 percent) will overtake Genoa Charter Township (14,029 workers, or 15.6 percent) for the largest amongst all townships in the County. The City of Brighton's labor force will trump all municipalities within the county by 2040, with 14,927 workers (16.6 percent). Tyrone Township's labor force is expected to grow by the largest percentage over the 30-year time period (63.1 percent), followed by Putnam Township (57.5 percent), and Unadilla Township (57.1 percent).

COMMUTING PATTERNS OF COUNTY LABOR FORCE

The table below provides an overview of the commuting patterns of Livingston County's labor force according to the most recent SEMCOG commuting data.

Commuting to Livingston	
Commuting from	
Livingston	36,891
Macomb	357
Monroe	86
Oakland	4,583
St. Clair	38
Washtenaw	2,407
Wayne	1,672
within Region	46,034
Out of Region	8,729

According to the data, the largest percentage of people that commute to Livingston County (from outside the county – SEMCOG region) for employment purposes come from Oakland County (4,583 workers – 9.9 percent), followed by Washtenaw County (2,407 workers – 5.2 percent) and Wayne County (1,672 workers – 3.6 percent).

Besides the 46,034 workers that commute to Livingston County from SEMCOG region communities, there were and additional 8,729 persons that commuted from outside the SEMCOG region.

Source: SEMCOG: *Commuting in Southeast Michigan 2006-2010*, May 2013.

Livingston County	
Less than 10 minutes	9.2%
10-29 minutes	38.6%
30-59 minutes	40.6%
60 or more minutes	11.6%

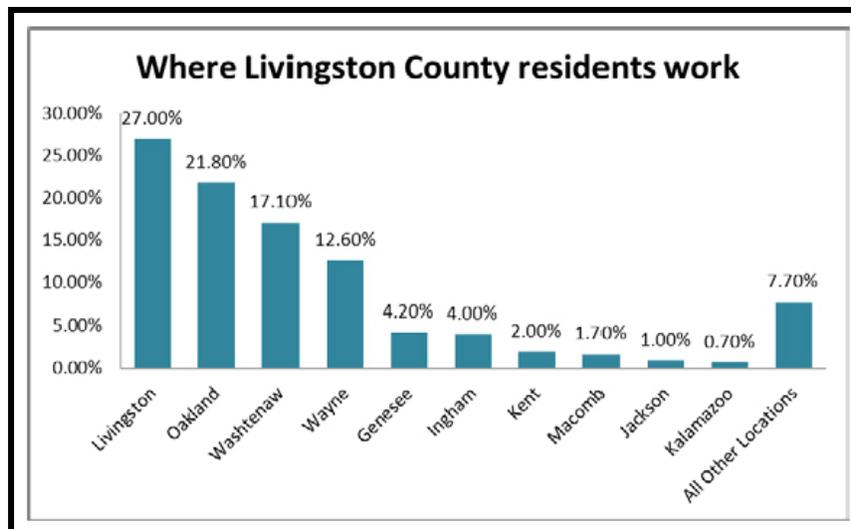
The table to the left indicates travel times to places of employment for Livingston County workers, as provided from the same SEMCOG study as the previous data.

According to the data, the majority (40.6 percent) of commuters travel between 30 to 59 minutes. The next largest percentage (38.6 percent) of commuters travel between 10 to 29 minutes. Additionally over 11 percent of commuters travel 60 minutes or more.

Source: SEMCOG: *Commuting in Southeast Michigan 2006-2010*, May 2013.

The study showed that the average commute time in the SEMCOG region in 2010 was 25.6 minutes almost the same as the national average of 25.3 minutes.

The Workforce Intelligence Network for Southeast Michigan (WIN) conducted a study in 2011-2012 which provided commuting statistics for where Livingston County residents work, both inside and outside the State of Michigan. The chart below provides the results of this study.



Source: Workforce Intelligence Network for Southeast Michigan: *Think Regionally: Southeast Michigan's Labor Shed*. 2012.

The chart shows that 73 percent of workers from Livingston County (54,861 workers) had jobs outside the county. At the time of the study, the majority of workers commuted to Oakland (21.8 percent), Washtenaw (17.1 percent) and Wayne (12.6 percent) counties.



COUNTY ECONOMIC PROFILE

Assessing the character of Livingston County's population is essential to producing an appropriate and functional economic development plan.

This chapter examines trends in key economic factors shaping Livingston County. Knowledge of these trends and their causes can inform the actions of policy makers and local officials seeking to meet the economic development challenges facing Livingston County communities.

PRIVATE INDUSTRY EMPLOYMENT TRENDS (2001-2011)

According to the table below, between 2001 and 2011, employment in private industries decreased overall by 6.8 percent.

Employment Changes in Livingston County 2001 - 2011				
SuperSectors	Employment 2001	Employment 2011	Employment Change	Percent Growth (Decline) 2001-2011
Natural Resources and Mining	187	204	17	9.1%
Construction	3,884	2,450	(1,434)	-36.9%
Manufacturing	8,918	6,901	(2,017)	-22.6%
Trade, Transportation, Utilities	9,951	10,361	410	4.1%
Information	352	354	2	0.6%
Financial Activities	3,930	2,022	(1,908)	-48.5%
Professional and Business Services	5,375	5,916	541	10.1%
Education and Health Services	7,046	8,083	1,037	14.7%
Leisure and Hospitality	5,365	5,164	(201)	-3.7%
Other Services	1,354	1,744	390	28.8%
	46,362	43,199	(3,163)	-6.8%

Source: Quarterly Census of Employment and Wages Data, Bureau of Labor Statistics, 2013.

The table above presents the employment changes for the time period and area you selected: Livingston, MI. The rows contain the titles and job statistics for all 11 industries that this analysis considers. The Trade, Transportation, and Utilities sector employed the most workers, followed by Education and Health Services, and the Manufacturing sector is third. This area had 43,199 private industry employees in 2011, in all industries including a

few jobs that BLS could not classify into the 11 sectors listed in the table.

During the period 2001 to 2011, employment in the area declined by -3,163 jobs. In terms of employment growth, the most important industry was Education and Health Services (1,037 jobs), and Professional and Business Services (541 jobs). Manufacturing saw the largest decrease in employment over the period (2,017 jobs).

TOP TEN PRIVATE INDUSTRIES (2011)

One can look deeper into these larger sectors by breaking them into smaller subsectors for a better perspective on industrial employment trends.

The table below provides figures for those industrial subsectors that accounted for the largest percentage of employment within the county between 2008 and 2011. Food Service and Drinking Places (NAICS 722) accounted for the largest employment subsector with 3,981 jobs (10 percent), followed by Administrative and Support Services (NAICS 561) at 2,781 jobs (7 percent), and Transportation Equipment Manufacturing (NAICS 336) 2,433 jobs (6.1 percent).

Source: Michigan State Department of Technology, Management and Budget, Bureau of Labor Market

Industry	Jobs	Percent of Total
Food Services and Drinking Places	3,981	10.0%
Administrative and Support Services	2,781	7.0%
Transportation Equipment Manufacturing	2,433	6.1%
General Merchandise Stores	2,384	6.0%
Ambulatory Health Care Services	2,166	5.4%
Specialty Trade Contractors	1,995	5.0%
Professional and Technical Services	1,932	4.8%
Fabricated Metal Product Manufacturing	1,299	3.3%
Insurance Carriers and Related Activities	1,132	2.8%
Merchant Wholesalers, Durable Goods	1,114	2.8%

Information and Strategic Initiatives, 2008-2011.

TOP TEN PRIVATE INDUSTRIES BY PERCENT JOB GROWTH

The table on the following page provides figures for those industrial sub-sectors that experienced the largest percentage of employment growth, by overall numeric growth, within the county between 2008 and 2011.

Plastics and Rubber Products Manufacturing (NAICS 326) saw a 52 percent increase in employment over the time period, followed by Transportation Equipment Manufacturing (NAICS 336) at 30 percent, and Social Assistance (NAICS 624) at 28.8 percent.

Industry	Numeric Job Growth	Percent Job Growth
Plastics and Rubber Products Manufacturing	128	52.0%
Transportation Equipment Manufacturing	562	30.1%
Social Assistance	177	28.8%
Ambulatory Health Care Services	337	18.4%
Health and Personal Care Stores	55	15.1%
Administrative and Support Services	339	13.9%
Machinery Manufacturing	84	12.5%
Repair and Maintenance	56	10.6%
Merchant Wholesalers, Durable Goods	100	9.9%
General Merchandise Stores	206	9.4%

Source: Michigan State Department of Technology, Management and Budget, Bureau of Labor Market Information and Strategic Initiatives, 2008-2011.

DECLINING INDUSTRIES

The table below provides figures for those industrial sub-sectors that experienced the greatest decline of employment, by percent change, within the county between 2008 and 2011.

The Food Manufacturing sub-sector (NAICS 311) experienced the greatest employment decline in the county over the period at nearly 38 percent, followed by Management of Companies and Enterprises (NAICS 551) at 32 percent and Food and Beverage Stores (NAICS 445) at 29 percent.

Industry	Fourth Quarter 2008 Employment	Fourth Quarter 2011 Employment	2008 - 2011 Numeric Change	2008 - 2011 Percent Change
Food Manufacturing	265	165	-100	-37.9%
Management of Companies and Enterprises	151	103	-48	-32.0%
Food and Beverage Stores	1,331	945	-386	-29.0%
Real Estate	342	260	-82	-23.9%
Electronics and Appliance Stores	399	319	-80	-20.1%
Accommodation	284	238	-45	-16.0%
Fabricated Metal Product Manufacturing	1,544	1,299	-244	-15.8%
Amusements, Gambling and Recreation	942	802	-140	-14.8%
Construction of Buildings	461	399	-62	-13.5%
Motor Vehicle and Parts Dealers	904	792	-112	-12.4%

Source: Michigan State Department of Technology, Management and Budget, Bureau of Labor Market Information and Strategic Initiatives, 2008-2011.

COMPOSITION AND GROWTH OF THE COUNTY INDUSTRIAL MIX (2000-2010 – NETS DATABASE)

The industrial mix of an economy can be subdivided into different composition stages that reflect operational and management issues establishments face as they grow from startups to mature companies. Stages provide a different framework for understanding the needs of businesses and supporting their growth - one that could help communities better leverage resources. For, regardless of their industry sector, companies in the same developmental stage experience similar challenges.

COMPOSITION shows how establishments, jobs, and sales are distributed according to the establishment sectors and employment stages. This section provides you a baseline for seeing what types of employers and stages exist in a region – and their share of establishments and jobs.

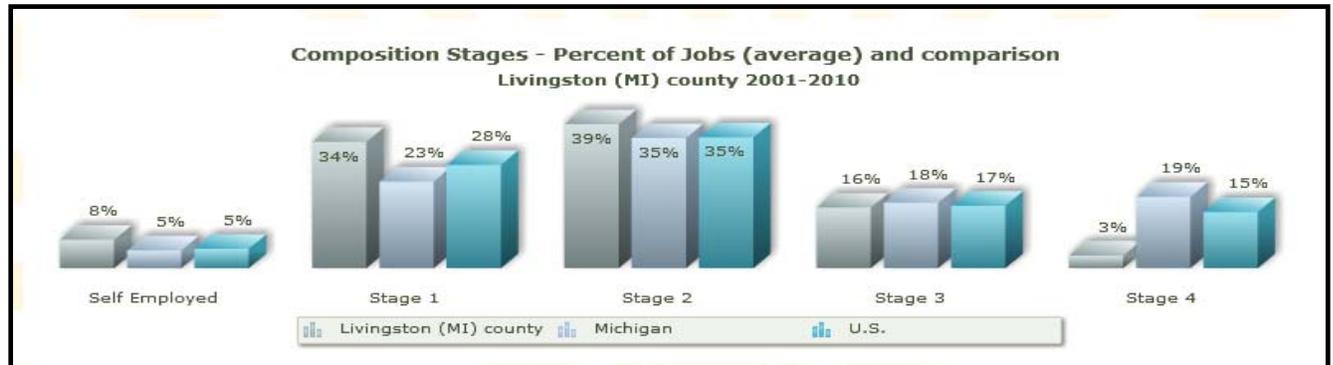
GROWTH follows openings, closings, expansions, contractions, move-ins and move-outs (growth factors) of establishments – showing how this activity affects job gains and losses.

As companies move through these stages, not only do their internal needs change, but their external needs - what they need from the community - also change. A local economy's Composition Stages consist of the following:

COMPOSITION STAGES	
Self-Employed (1 employee)	This includes small-scale business activity that can be conducted in homes (cottage establishments) as well as sole proprietorships.
Stage 1 (2-9 employees) "STARTUPS"	This includes partnerships, lifestyle businesses and startups. This stage is focused on defining a market, developing a product or service, obtaining capital and finding customers.
Stage 2 (10-99 employees) "STABLE"	At this phase, a company typically has a proven product, and survival is no longer a daily concern. Companies begin to develop infrastructure and standardize operational systems. Leaders delegate more and wear fewer hats.
Stage 3 (100-499 employees) "EXPANSIONS"	Expansion is a hallmark at this stage as a company broadens its geographic reach, adds new products and pursues new markets. Stage 3 companies introduce formal processes and procedures, and the founder is less involved in daily operations and more concerned with managing culture and change.
Stage 4 (500 or more employees) "MARKET DOMINATORS"	At this level of maturity, an organization dominates its industry and is focused on maintaining and defending its market position. Key objectives are controlling expenses, productivity, global penetration and managing market niches.

Source: NETS (National Establishment Time Series) Database

The Composition Stages for the Livingston County economy was compared to both the State of Michigan and the United States for the period 2001-2010. The results of this analysis are provided in the graphic below.



Source: NETS (National Establishment Time Series) Database, 2013

This analysis relies on data derived from the National Establishment Time Series (NETS) database. The NETS database includes employment and sales data on private businesses as well as Non-Governmental Organizations (NGOs) and public sector establishments based on rating tracking from Dun and Bradstreet. Businesses included in the NETS database range from sole proprietorships to large corporations. The NETS database is the most comprehensive accounting of businesses and their performance. Businesses are categorized within the NAICS code in which they are primarily engaged.

According to the analysis, Livingston County Composition Stages closely mirrored those in the State of Michigan and the U.S. As is the case in all three economies, the largest Composition Stage are Stage 2 companies (10-99 employees, - "stable"), in fact, Livingston County's economy consists of a higher percentage of Stage 2 companies (39 percent) in comparison to the State and the U.S. (both at 35 percent). Livingston County had a higher percentage of Self-Employed and Stage 1 companies (2-9 employees, - "startups") than the State or the U.S. as well. The County had a slightly lower percentage (16 percent) of Stage 3 companies (100-499 employees, - "expansions") than the State (18 percent) and the U.S. (17 percent), but the percentage was still respectable given the overall size of the County's economy (~40,000 employees). The County lagged behind the State and the U.S. in its percentage of Stage 4 companies (500+ employees, "market dominators") with only 3 percent of the County's economy composed of these types of companies, as compared with 19 percent at the State and 15 percent in the U.S.

"SECTORS" explained...

RESIDENT: stand-alone establishments (business) in the area or businesses with headquarters in the same state. The Resident sector is then subdivided into employment stages. The number in () denotes employees:

- Self-Employed (1)
- Stage 1 (2-9)
- Stage 2 (10-99)
- Stage 3 (100-499)
- Stage 4 (500+).

NONRESIDENT: establishments (businesses) that are located in the area but headquartered in a different state.

NONCOMMERCIAL: educational institutions, post offices, government agencies and other nonprofit organizations.

The tables on the following page provide an analysis of Composition Stage changes in establishments and jobs.

LIVINGSTON COUNTY ESTABLISHMENTS

ESTABLISHMENTS	2001	2010	Change	%
TOTAL	9,439	15,588	6,149	65.1%
Noncommercial	341	506	165	48.4%
Nonresident	312	352	40	12.8%
Resident	8,786	14,730	5,944	67.7%
Self-Employed (1)	2,585	6,229	3,644	141.0%
Stage 1 (2-9)	5,184	7,526	2,342	45.2%
Stage 2 (10-99)	954	931	-23	-2.4%
Stage 3 (100-499)	57	44	-13	-22.8%
Stage 4 (500+)	6	0	-6	-100.0%

Source: NETS (National Establishment Time Series) Database, 2013

According to the tables above, the number of self-employed and Stage 1 establishments increased dramatically within the County between 2001 and 2010 (141 percent and 45.2 percent respectively). At the other end of the spectrum, the number of larger establishments (Stage 3 and 4) fell sharply, especially Stage 4 companies.

STATE OF MICHIGAN ESTABLISHMENTS

ESTABLISHMENTS	2001	2010	Change	%
TOTAL	512,156	787,784	275,628	53.8%
Noncommercial	32,360	38,492	6,132	18.9%
Nonresident	25,321	20,618	-4,703	-18.6%
Resident	454,475	728,674	274,199	60.3%
Self-Employed (1)	118,200	296,295	178,095	150.7%
Stage 1 (2-9)	265,038	370,355	105,317	39.7%
Stage 2 (10-99)	65,674	57,703	-7,971	-12.1%
Stage 3 (100-499)	4,855	3,845	-1,010	-20.8%
Stage 4 (500+)	708	476	-232	-32.8%

Source: NETS (National Establishment Time Series) Database,

When compared to establishment data at the State level, the County fared better in the growth of Stage 1 and 2 establishments and fairly similar to growth patterns in self-employed establishments. As was the case in the County, the decline in Stage 3 and 4 establishments was fairly dramatic.

Summary - Growth Factors – Net New Jobs Churn



Source: NETS (National Establishment Time Series) Database, 2013

When assessing the overall performance of Livingston County jobs and establishments during the period 2001-2010, overall, jobs grew 4.6 percent while sales grew 10.1 percent. Primarily, the job gain was caused by the expansions of existing companies (6.6 percent). The number of job gains would have been greater had net opened jobs not decreased 5.4 percent during the same period. About 3.4 percent of job gains came from companies moving.

When compared to the State of Michigan, jobs in the State fell 10.2 percent while sales fell 15.3 percent. Primarily, the job loss experienced in the State was caused by establishments that went out of business during this period, causing an 11.5 percent reduction of jobs. The number of job losses would have been greater if the expansions of existing companies had not added 1.3 percent more jobs during the same period.

COUNTY ECONOMIC BASE ANALYSIS

There are numerous reasons for local economic changes. Entry of new businesses, expansion of existing businesses, new government policies, national economic trends, and global economic events can greatly affect the economic condition of a locality. These changes can affect all or most of the sectors in an economy even though the transactions of one sector seemingly are unrelated to other sectors.

Understanding the current state of the local economy including its relative strengths and weaknesses is necessary in order to formulate answers to existing and/or new economic challenges. This understanding can come from a detailed analysis of current and past performance of the local economy.

ECONOMIC BASE ANALYSIS

Economic base analysis is the preferred method among economic development specialists for understanding a local economy. It is a simple yet valuable tool that can be used to gain an understanding of the economic structure of communities. It can provide comparative information on the economic status of a locality across time periods and other localities with respect to employment conditions and trends.

Economic base analysis assumes that the local economy can be divided into two main sectors: basic and non-basic. The basic sector is made up of those local businesses that produce goods and services sold to consumers outside the community/region. Economic base analysis assumes that the sales of a basic firm are dependent almost entirely on export markets.

For example, the Asahi Kasei Plastics facility in Fowlerville sells to customers located all over the world. Their sales to consumers in Livingston County are negligible compared to their total sales outside of Livingston County. The non-basic sector, on the other hand, is composed of those firms that produce goods and services that are sold and consumed locally. Almost all local businesses such as hairdressers, dentists, restaurants, and drug stores can be categorized as non-basic because they depend almost entirely on local market sales.

Economic base analysis is grounded on the premise that basic industries form the economic base of a locality, and all other industries flourish by servicing this sector. Through its non-local market sales and resulting injection of new money into the local economy, the basic sector is an important contributor to and driver of local economic growth and progress. Changes in the composition or performance of the basic sector usually impact the non-basic sector and overall trends in the local economy. Economic base analysis has shown that the local economy is strongest when it develops those economic sectors that bring new dollars into the local economy.

Ideally, economic base analysis should use industry output and trade flows to and from a locality. However, due to data disclosure issues this is not possible for some localities. The alternative is to use employment data. Although there are several ways to estimate the economic base of a locality, the location quotient (LQ) approach is the most popular method. Location quotients measure the relative concentration of a given industry in a given locality compared to a larger area such as the whole nation, the state, or the region.

The location quotient is the ratio of an industry's share of the local employment (locality) divided by its share of the reference area (the nation, the state, or the region). A location quotient of greater than one indicates that this is a "basic" industry—local production can satisfy local consumption and excess may be exported. A location quotient of less than one indicates that the industry cannot satisfy local consumption and the difference must be

imported. A location quotient equal to one indicates production can just meet the local consumption demand.

LIVINGSTON COUNTY LOCATION QUOTIENTS

According to the table below, the Manufacturing sector's export capacity increased between 2001 (LQ= 0.99) and 2011 (LQ=1.12). Similarly, the Retail Trade (2011 LQ = 1.35), Professional and Technical Services (2011 LQ 1.06) and Arts, Entertainment and Recreation (2011 LQ = 1.58) sectors all realized increases in export capacity. At the other end of the spectrum, the loss of local jobs and establishments in the Finance and Insurance sector (NAICS 52) as well as Transportation and Warehousing (NAICS 48-49) contributed to the reduction of their export potential over the period.

Employment Category	Location Quotients	
	2001	2011
NAICS 11 - Agriculture, forestry, fishing and hunting	0.59	0.52
NAICS 21 - Mining, quarrying, oil and gas extraction	0.35	0.39
NAICS 22 - Utilities	---	0.19
NAICS 23 - Construction	1.72	1.63
NAICS 31-33 - Manufacturing	0.99	1.12
NAICS 42 - Wholesale trade	---	0.83
NAICS 44-45 - Retail trade	1.10	1.35
NAICS 48-49 - Transportation and warehousing	1.31	1.11
NAICS 51 - Information	0.43	0.43
NAICS 52 - Finance and insurance	1.42	1.03
NAICS 53 - Real Estate, renting and leasing	2.60	0.65
NAICS 54 - Professional and technical services	0.90	1.06
NAICS 55 - Management of companies and enterprises	0.25	0.18
NAICS 56 - Administrative and waste services	0.86	0.88
NAICS 61 - Educational services	0.30	0.29
NAICS 62 - Healthcare and social services	0.58	0.71
NAICS 71 - Arts, entertainment, and recreation	1.50	1.58
NAICS 72 - Accommodation and food services	1.20	1.07
NAICS 81 - Other Services, ex. public administration	0.90	1.17

Source: Quarterly Census of Employment and Wages Data, Bureau of Labor Statistics, 2013.

LIVINGSTON COUNTY SHIFT-SHARE ANALYSIS

In economic analysis there is a technique called *shift-share analysis*. Its purpose is to take the change in employment for an area and decompose it into the three sources that caused the change.

The technique is based on the assumption that local economic growth is explained by the combined effect of three components: national share, industry mix, and competitive share. Thus, one can apply shift-share to determine how much each component contributes to local economic growth. In addition, the shift-share technique may be used to identify a local economy's competitive industries. A competitive industry is defined as one that outperforms its counterpart at the national level.

The Shift-Share Formula Is:

$$SS = NS + IM + CS$$

SS - Shift-Share

NS - National Share

IM - Industry Mix

CS - Competitive Share

The table below provides a shift-share analysis of Livingston County based on the eleven economic supersectors and employment growth patterns in the County and the U.S. for the years 2001 and 2011.

Livingston County Shift-Share Analysis, 2001 - 2011						
SuperSectors	National Growth Component, Percent	National Growth Component, Jobs	Industrial Mix Component, Percent	Industrial Mix Component, Jobs	Competitive Share Component, Percent	Competitive Share Component, Jobs
Natural Resources and Mining	-0.2%	-	10.9%	20	-1.6%	(3)
Construction	-0.2%	(6)	-18.8%	(730)	-18.0%	(698)
Manufacturing	-0.2%	(14)	-28.4%	(2,530)	5.9%	527
Trade, Transportation, Utilities	-0.2%	(15)	-15.0%	(371)	8.0%	796
Information	-0.2%	(1)	-24.3%	(86)	25.0%	88
Financial Activities	-0.2%	(6)	-3.2%	(127)	-45.2%	(1,775)
Professional and Business Services	-0.2%	(8)	6.0%	325	4.2%	224
Education and Health Services	-0.2%	(11)	19.5%	1,377	-4.7%	(329)
Leisure and Hospitality	-0.2%	(8)	12.3%	662	-15.9%	(855)
Other Services	-0.2%	(2)	6.0%	81	23.0%	311
		(71)		(1,379)		(1,714)

Source: Quarterly Census of Employment and Wages Data, Bureau of Labor Statistics, 2013.

Interpreting County Shift-Share Data - The National Growth Component

The National Share (NS) measures by how much total employment in a local area increased because of growth in the national economy during the period of analysis. For example, all else being equal, if employment in the U.S. economy grew by 10 percent during the period of analysis, then total employment in the local area would have grown at the same rate.

The first source of change is the growth or contraction in the United States economy. During the time period 2001 to 2011, the nation's employment grew by -0.2 percent (i.e., America's employment in 2001 and 2011 was 129.6 million and 129.4 million, respectively). The growth rate is therefore:

$$(129.4 - 129.6) / 129.6 * 100 = -0.2 \text{ percent.}$$

This growth rate is listed in the shift-share table as the **National Growth** component.

The effect of the National Growth component is felt most acutely during the peaks and valleys of the business cycle, i.e. during recessions and boom times. Local businesses are very aware of how the general business climate affects them.

As reported in the Employment Changes 2001-2011 table, the county's largest employer, the Trade, Transportation, and Utilities sector, had the highest national growth component. The -0.2 percent National Growth component led to this sector's employment declining by -15 jobs (i.e., -0.2 percent times the sector's base employment, 9,951, equals -15 jobs). Overall, the national growth component was responsible for a total decline of -71 jobs in Livingston County over the time period analyzed.

An understandable goal of some local leaders is to make their economy more 'recession proof'. Economies with more employment in government, military and education will experience less fluctuation because those sectors are not directly related to the business cycle. Also, economic sectors that are experiencing more growth will provide larger employment gains to a local economy.

Interpreting County Shift-Share Data - The Industrial Mix Component

Insight into these growing sectors is provided by the second aspect that shift-share analysis considers, which is the **Industrial Mix** component.

This component is found by calculating the percent growth rate for an economic sector at the national level and subtracting from it the national growth component. Thus, the industrial mix component measures how well an industry has grown, net of effects from the business cycle.

Industry Mix (IM) identifies fast growing or slow growing industrial sectors in a local area based on the national growth rates for individual industry sectors. Thus, a local area with an above-average share of the nation's high-growth industries would have grown faster than a local area with a high share of low-growth industries.

The County Shift-Share table on page 73 lists these components for each industrial sector.

The highest industrial mix component was 19.5 percent in the Education and Health Services sector, and it was responsible for 1,377 jobs (i.e., 19.5 percent times this sector's base employment, 7,046, equals 1,377 jobs). If this area's employment were concentrated in these sectors with higher industrial mix components, then the area could expect more employment growth. After adding up across all eleven sectors, it appears that the Industrial Mix component was responsible for decreasing Livingston County's employment by -1,379 jobs.

Thus, the county has a concentration of employment in industries that were decreasing nation-wide, in terms of employment over the time period analyzed. The majority of these jobs can be attributed to decreases in the Manufacturing sector.

Shift-share analysis does not explain why an economic sector has slower or faster growth. Rather, the local development official must use knowledge about the business conditions facing particular industries to understand this. For example, in some rural counties the manufacturing sector was once dominated by apparel firms. The availability of low-priced imported clothing in the 1990's has meant that many apparel firms have gone out of business. Many counties therefore have a negative industrial mix component for manufacturing.

Interpreting County Shift-Share Data - The Competitive Share

The third and final component of shift-share analysis is called the **Competitive Share**.

Competitive Share is the remaining employment change that is left over after accounting for the National and Industrial Mix components. If a sector's Competitive Share is positive, then the sector has a local advantage in promoting employment growth.

The Competitive Share effect is perhaps the most important component. It highlights a local area's leading and lagging industries. Specifically, the Competitive Share effect compares a local area's growth rate in an industry sector with the growth rate for that same sector at the U.S. level. A leading industry is one where that industry's local area growth rate is greater than its U.S. growth rate. A lagging industry is one where the industry's local area growth rate is less than its U.S. growth rate.

For example, taken from the County Shift-Share table, the Trade, Transportation, and Utilities sector employment grew by 4.1 percent. Of this 4.1 percent, -0.2 percent was due

to the National Growth component and -3.7 percent was due to the Industrial Mix. This leaves a remaining 8 percent that is attributable to the local conditions facing this economic sector. For the Trade, Transportation, and Utilities sector, the Competitive Share translated into 796 jobs (i.e., 8 percent times the base employment level of 9,951 equals 796 jobs).

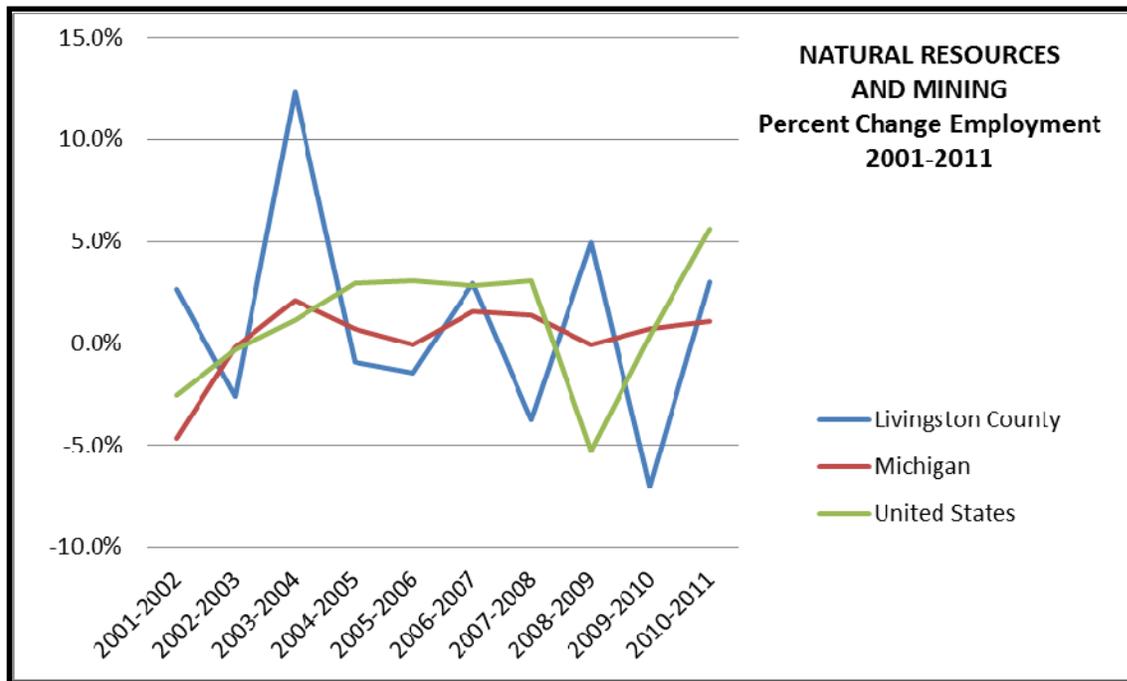
The top three sectors in Competitive share were Trade, Transportation, and Utilities, the Manufacturing sector, and Professional and Business Services. Across all sectors, the Competitive Share component totaled a loss of 1,714 jobs. This indicates that Livingston County was not competitive in securing additional employment during the time period analyzed.

A positive competitive share component would indicate that the county had a productive advantage. This advantage could be due to local firms having superior technology, management, or market access, or the local labor force having higher productivity and/or lower wages. A negative competitive share component could be caused by local shortcomings in all these areas.

By examining the competitive share components for each industry, the development official can easily identify which local industries have a positive competitive share component. This also indicates which industries have competitive advantages over other counties and regions. Local officials can then devise strategies to improve local conditions faced by particular industries selected for focus. These strategies may include specialized training programs for workers and management, improved access to input and product markets through transportation and telecommunications, or arranged financial alternatives for new machinery and equipment.

COUNTY EMPLOYMENT CHANGE BY NAICS SECTOR, 2001 - 2011

NATURAL RESOURCES AND MINING (NAICS SECTORS 11, 21)



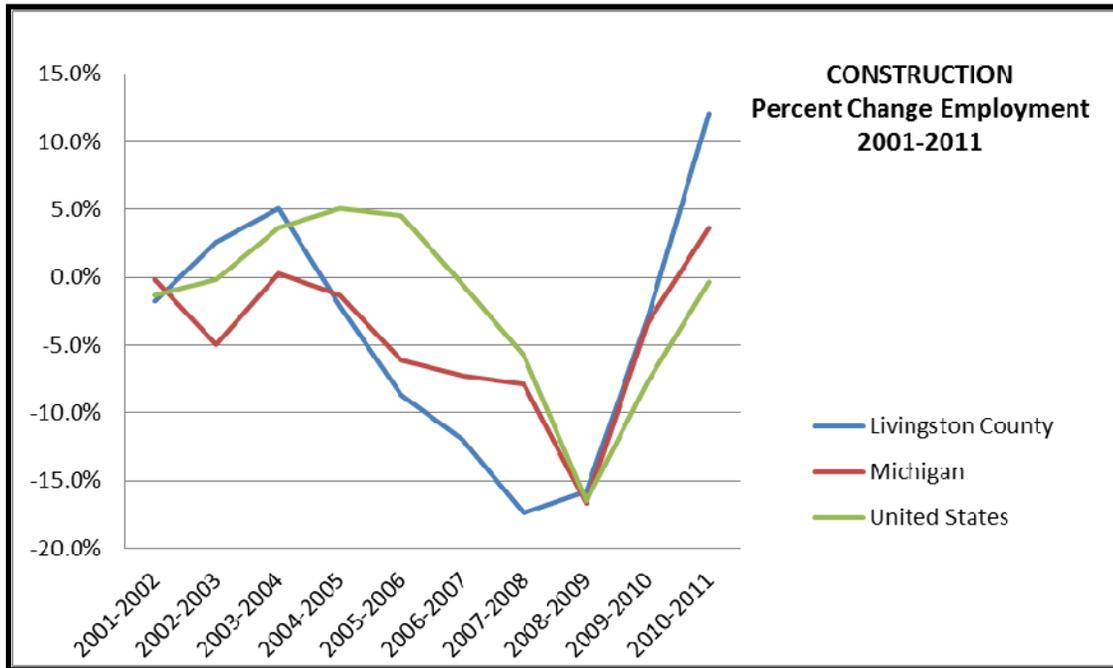
Natural Resources and Mining										
Percent Change	2001- 2002	2002- 2003	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008	2008- 2009	2009- 2010	2010- 2011
Livingston County	2.7%	-2.6%	12.3%	-1.0%	-1.4%	2.9%	-3.8%	4.9%	-7.0%	3.0%
Michigan	-4.7%	-0.2%	2.1%	0.7%	-0.1%	1.6%	1.4%	-0.1%	0.7%	1.1%
United States	-2.6%	-0.3%	1.1%	2.9%	3.1%	2.8%	3.1%	-5.3%	0.3%	5.6%

Source: Quarterly Census of Employment and Wages Data, 2013

This sector comprises activities such as agricultural production and support activities and mining natural resources. As the chart above indicates, employment patterns in these sectors in the County roughly followed those in both the State and the U.S, except for a significant increase in employment in the County between 2003 and 2004. Percent change in employment ranged between 5 percent growth and 5 percent decline for the decade.

In 2001 these sectors comprised approximately 1 percent of both the State's and the county's overall industrial mix. Little had changed over the decade, as by 2011, these sectors had still only comprised little more than 1 percent percent of each economy's overall industrial mix.

CONSTRUCTION (NAICS SECTOR 23)



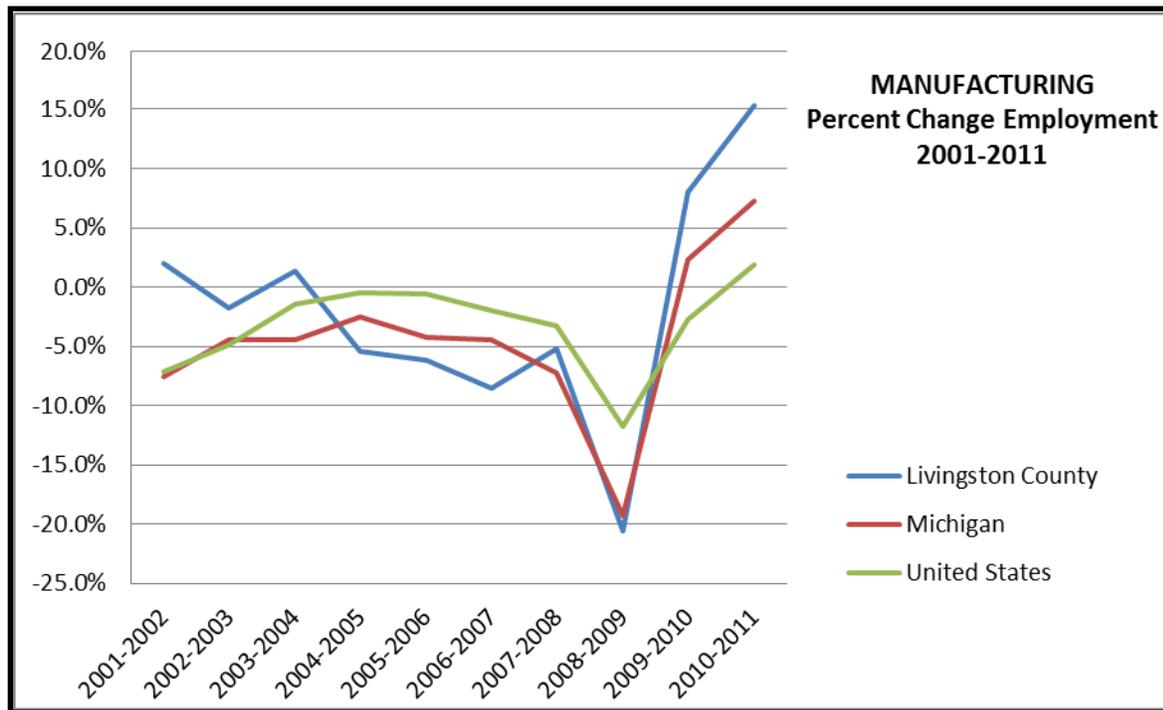
Construction										
Percent Change	2001- 2002	2002- 2003	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008	2008- 2009	2009- 2010	2010- 2011
Livingston County	-1.8%	2.6%	5.1%	-2.1%	-8.7%	-12.0%	-17.4%	-15.8%	-3.0%	12.1%
Michigan	-0.2%	-5.0%	0.3%	-1.3%	-6.1%	-7.3%	-7.9%	-16.7%	-3.4%	3.6%
United States	-1.3%	-0.2%	3.7%	5.1%	4.6%	-0.5%	-5.8%	-16.5%	-7.7%	-0.3%

Source: Quarterly Census of Employment and Wages Data, 2013

This sector comprises activities such as construction of buildings and infrastructure. As the chart above indicates, employment patterns in these sectors in the County roughly followed those in both the State and the U.S. The economic downturn experienced by the nation and the State of Michigan were similarly reflected in the county. Employment trends in this sector in the county lagged behind the nation and the State between 2004 and 2009. However, in 2009 begin a period of rapid growth in this sector. In 2011, this sector experienced its largest employment gains, as the county saw a 12.1 percent increase.

In 2001, this sector comprised approximately 5.4 percent of the overall industrial mix in the State, and 9.2 percent in the county. By 2011, this sector had declined in both the State (3.8 percent) and in the county (6.2 percent).

MANUFACTURING (NAICS SECTOR 31-33)



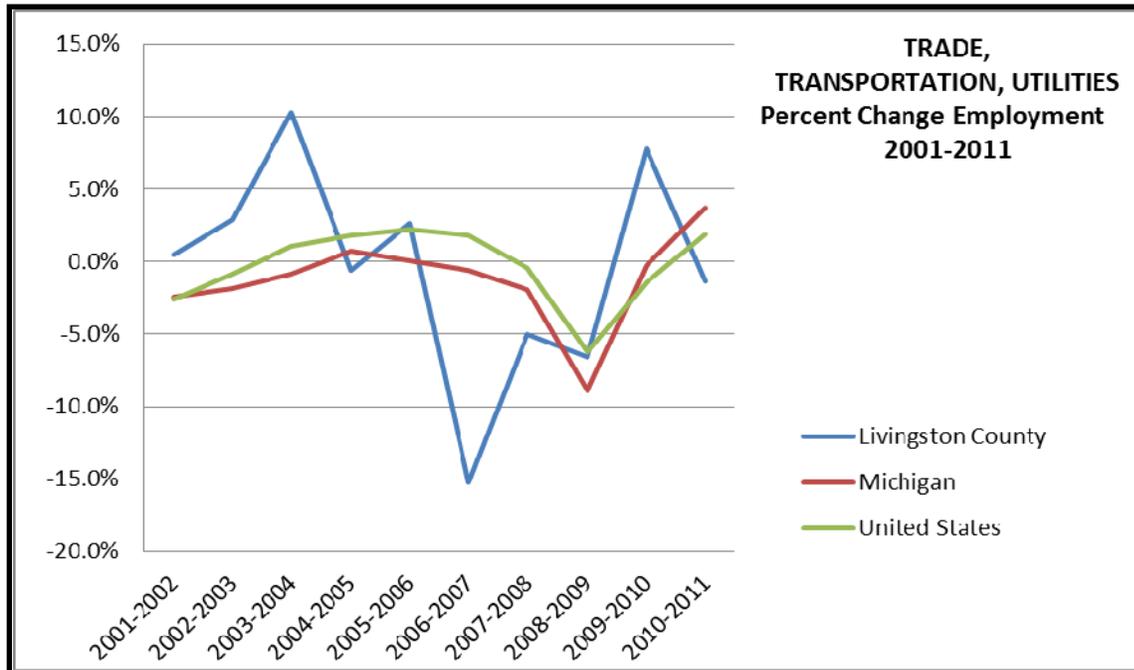
Manufacturing	2001- 2002	2002- 2003	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008	2008- 2009	2009- 2010	2010- 2011
Percent Change										
Livingston County	2.0%	-1.8%	1.3%	-5.4%	-6.2%	-8.5%	-5.2%	-20.5%	8.0%	15.3%
Michigan	-7.6%	-4.5%	-4.4%	-2.6%	-4.2%	-4.4%	-7.2%	-19.3%	2.3%	7.2%
United States	-7.2%	-4.9%	-1.4%	-0.5%	-0.6%	-2.0%	-3.3%	-11.7%	-2.7%	1.9%

Source: Quarterly Census of Employment and Wages Data, 2013

Covers all manufacturing activities including the production of durable and nondurable goods. As the chart above indicates, employment patterns in these sectors in the County roughly followed those in both the State and the U.S. Much of the decline and growth experienced by both the county and the State in this sector could be attributed the automotive sub-sector. Since 2009, this sector has realized excellent growth in all economies of scale, which continued through 2011.

In 2001, this sector comprised approximately 21.4 percent of the State's and 21.2 percent of the county's overall industrial mix. By 2011, this sector comprised approximately 15.5 percent of the State's and 17.4 percent of the county's overall industrial mix.

TRADE, TRANSPORTATION, UTILITIES (NAICS SECTORS 22, 42, 48-49)



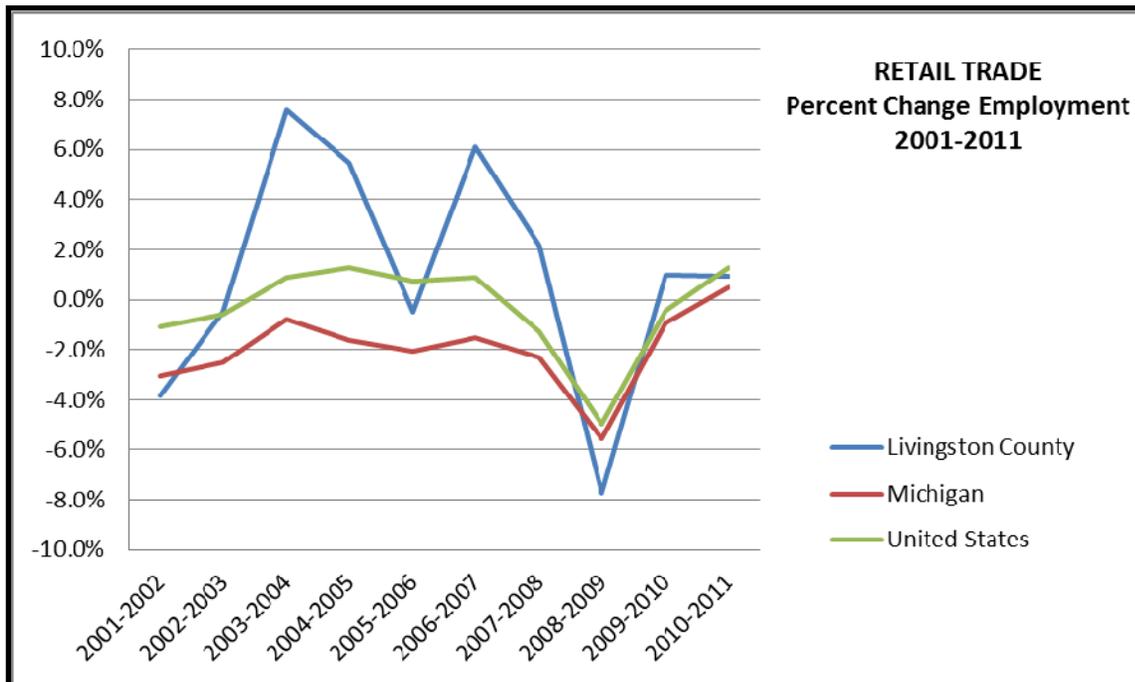
Trade, Transportation, Utilities										
Percent Change	2001- 2002	2002- 2003	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008	2008- 2009	2009- 2010	2010- 2011
Livingston County	0.5%	2.8%	10.3%	-0.6%	2.6%	-15.2%	-5.0%	-6.6%	7.8%	-1.4%
Michigan	-2.5%	-1.9%	-0.9%	0.7%	0.1%	-0.6%	-2.0%	-9.0%	-0.3%	3.7%
United States	-2.6%	-0.9%	1.0%	1.8%	2.3%	1.8%	-0.4%	-6.3%	-1.4%	1.9%

Source: Quarterly Census of Employment and Wages Data, 2013

This sector includes the wholesaling of merchandise; the transportation of people and goods; storage; and the provision of utility services. This sector is built upon NAICS sectors: 22, 42, 48, and 49. Within the county, these sectors experienced excellent growth immediately prior to 2001 up to 2003, while throughout the decade, employment trends in these sectors at the State and national levels mirrored each other. Employment in these sectors at the county level experienced dramatic decline between 2003 and 2007. In 2007, employment trends in these sectors in the county began trending upward which carried through 2010.

In 2001 these sectors comprised approximately 7.9 percent of the State's and 8.1 percent of the county's overall industrial mix. By 2011, these sectors comprised approximately 8.2 percent of the State's and 7.2 percent of the county's overall industrial mix.

RETAIL TRADE (NAICS SECTORS 44-45)



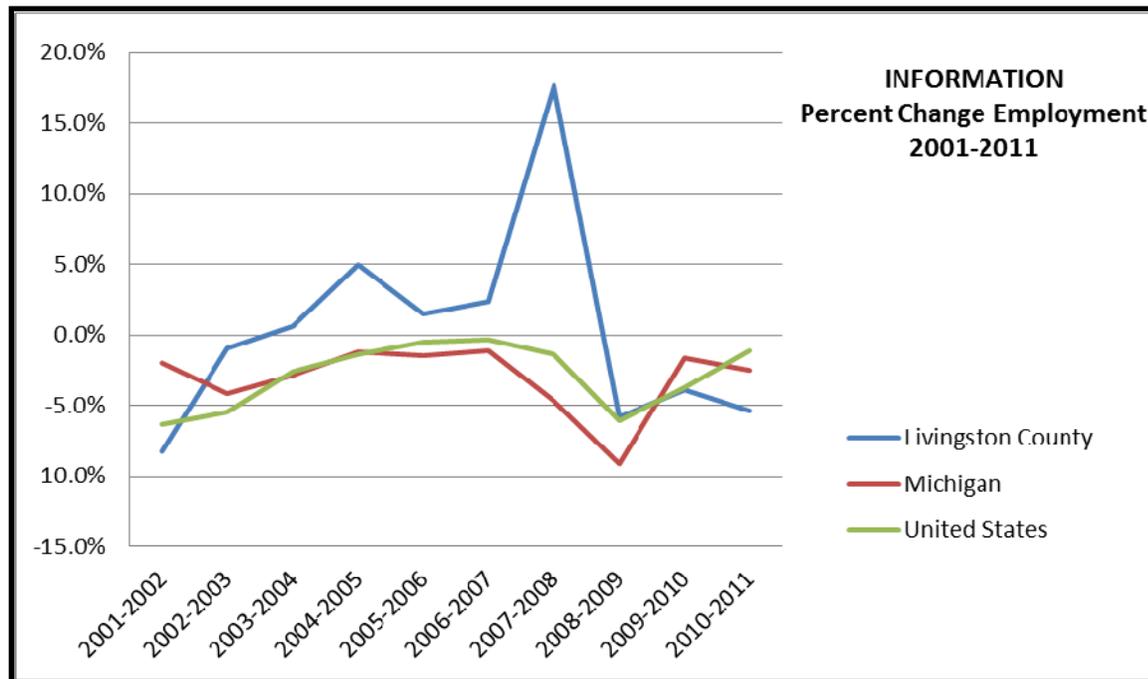
Retail Trade										
Percent Change	2001- 2002	2002- 2003	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008	2008- 2009	2009- 2010	2010- 2011
Livingston County	-3.8%	-0.5%	7.6%	5.5%	-0.5%	6.1%	2.2%	-7.7%	1.0%	1.0%
Michigan	-3.1%	-2.5%	-0.8%	-1.6%	-2.1%	-1.5%	-2.3%	-5.5%	-0.9%	0.5%
United States	-1.1%	-0.6%	0.9%	1.3%	0.7%	0.9%	-1.3%	-5.0%	-0.4%	1.3%

Source: Quarterly Census of Employment and Wages Data, 2013

Covers all retail activity, where goods are sold to the general public. This sector is built upon NAICS Sectors 44 and 45. Prior to 2004 within the county, this sector saw excellent growth trends. However, in 2004, this sector experienced a two-year period of dramatic decline. The sector rebounded somewhat between 2006 and 2007. However, this growth was followed by what was the largest downturn of the decade within the sector between 2007-2009. Since 2009, growth in this sector has again rebounded, leveling off between 2009 and 2011. In comparison, throughout the decade, employment trends in these sectors at the State and national levels relatively mirrored each other, with much less dramatic upturns and downturns.

In 2001, this sector comprised approximately 14.2 percent of the State's and 15.7 percent of the county's overall economic mix. In 2011, approximately 13.5 percent of the State's and 18.4 percent of the county's overall industrial mix was found in this sector.

INFORMATION (NAICS SECTOR 51)



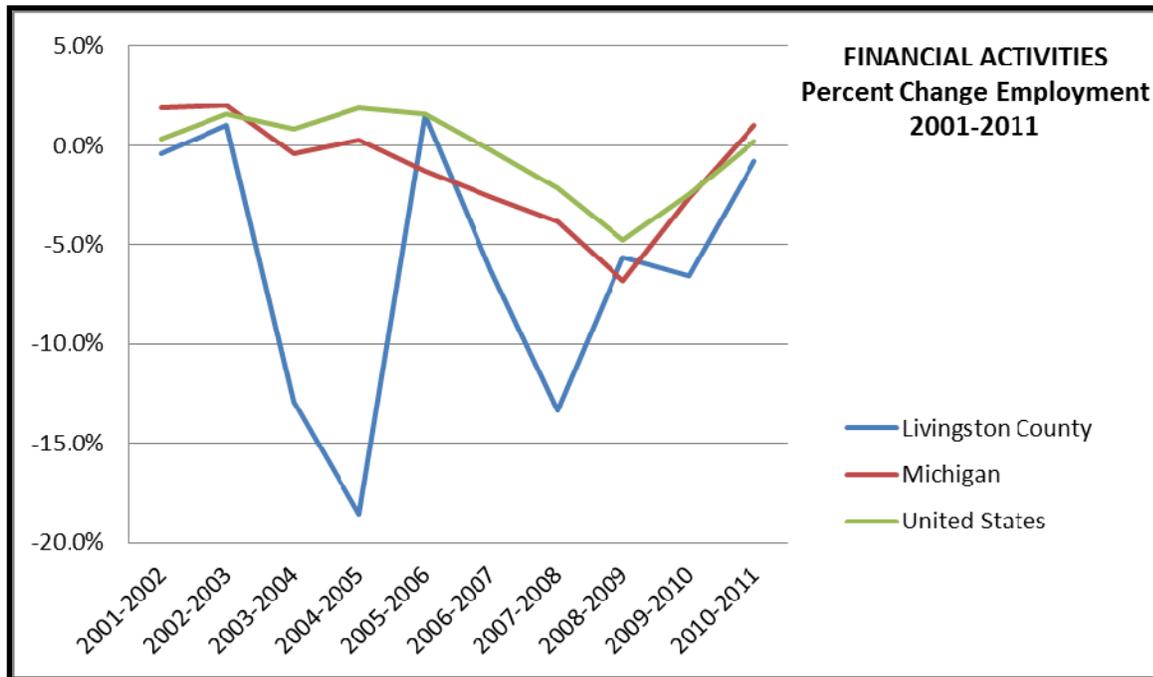
Information	2001- 2002	2002- 2003	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008	2008- 2009	2009- 2010	2010- 2011
Percent Change										
Livingston County	-8.2%	-0.9%	0.6%	5.0%	1.5%	2.3%	17.7%	-5.8%	-3.9%	-5.3%
Michigan	-2.0%	-4.2%	-2.9%	-1.2%	-1.5%	-1.1%	-4.7%	-9.1%	-1.6%	-2.5%
United States	-6.3%	-5.5%	-2.6%	-1.4%	-0.5%	-0.4%	-1.3%	-6.1%	-3.7%	-1.1%

Source: Quarterly Census of Employment and Wages Data, 2013

Covers all Information-related jobs. At the county level, this sector saw continue upward employment trends, culminating with a 17.1 percent increase in employment between 2007 and 2008. This trend was followed up by a dramatic decrease (~23 percent) between 2008 and 2009. Since 2009 this sector has begun to trend back upward. In comparison, throughout the decade, employment trends in these sectors at the State and national levels relatively mirrored each other, with the State lagging behind the nation as a whole between 2005 and 2009.

In 2001, this sector comprised approximately 2 percent of the State's and 0.8 percent of the county's overall industrial mix. By 2011, this sector had comprised approximately 1.6 percent of the State's and 0.7 percent of the county's overall industrial mix.

FINANCIAL ACTIVITIES (NAICS SECTORS 52-53)



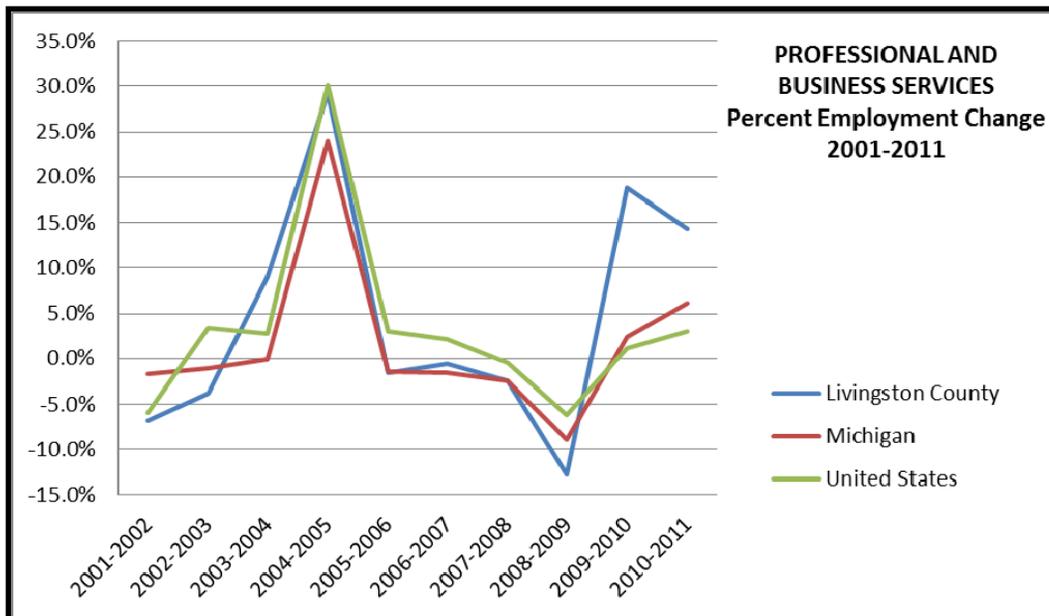
Financial Activities	2001- 2002	2002- 2003	2003- 2004	2004- 2005	2005- 2006	2006- 2007	2007- 2008	2008- 2009	2009- 2010	2010- 2011
Percent Change										
Livingston County	-0.4%	1.0%	-12.9%	-18.6%	1.5%	-6.3%	-13.3%	-5.6%	-6.6%	-0.8%
Michigan	1.9%	2.0%	-0.4%	0.3%	-1.3%	-2.6%	-3.8%	-6.8%	-2.6%	1.0%
United States	0.4%	1.6%	0.8%	1.9%	1.5%	-0.2%	-2.2%	-4.8%	-2.5%	0.2%

Source: Quarterly Census of Employment and Wages Data, 2013

Financial Activities - Most of these jobs are for employers engaged in export-oriented services, such as Finance, Insurance, Real Estate, Rental, and Leasing. After a short uptick in employment between 2001 and 2002, this sector saw dramatic decreases over the next two years. These losses were eclipsed by a large increase between 2005-2006. This short growth period was followed by another dramatic decrease in employment between 2006-2008. However, since 2008, these sectors had again experienced upward employment trends which continued through 2011. In comparison, these sectors at the State and national levels saw modest losses in employment between 2001-2009. As in the county, these sectors begin a period of advancing growth beginning in 2009.

In 2001, these sectors comprised approximately 5.9 percent of the State's and 9.3 percent of the county's overall industrial mix. By 2011, 5.5 percent of the State's and 5.0 percent of the county's overall industrial mix was comprised within these sectors.

PROFESSIONAL AND BUSINESS SERVICES (NAICS SECTORS 54-56, 81)



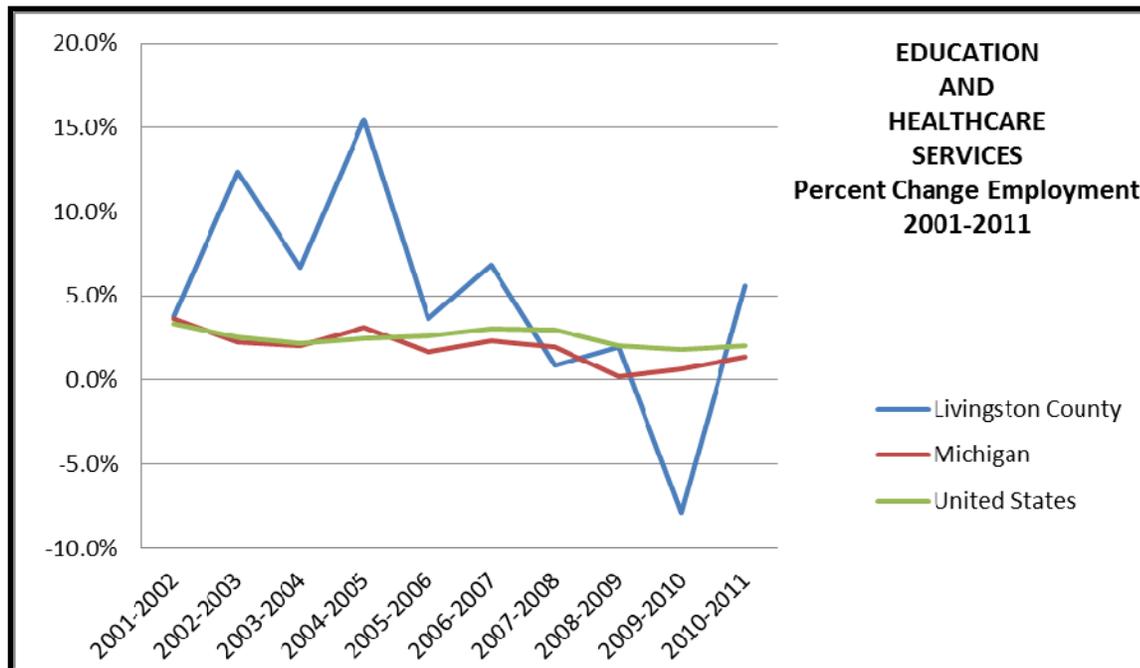
Professional and Business Services										
Percent Change	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Livingston County	-6.8%	-3.9%	9.0%	29.2%	-1.6%	-0.6%	-2.5%	-12.8%	18.7%	14.3%
Michigan	-1.7%	-1.1%	-0.1%	24.1%	-1.5%	-1.6%	-2.5%	-8.9%	2.3%	6.1%
United States	-6.0%	3.3%	2.8%	30.1%	3.0%	2.1%	-0.5%	-6.2%	1.2%	3.1%

Source: Quarterly Census of Employment and Wages Data, 2013

Professional and Business Services – This sector comprises employers who provide support services to firms and general services to households; such as Professional and Technical Services, Management of Companies and Enterprises, Administrative, Support, and Waste Management and Remediation Services, and other services not related to public administration. For the most part, employment trends in these sectors within the county mirrored trends in both the State and the nation. All three economies experienced a sharp upward spike in employment between 2003-2005, which was followed by a sharp downward spike between 2005-2006, which continued downward over the next 3-year period. Beginning in 2009, this sector began a dramatic increase, with the county's growth rate far surpassing that realized in either of the other two economies. These sectors took a slight downturn between 2010-2011 in the county.

In 2001, these sectors comprised approximately 15.7 percent of the State's and 6.5 percent of the county's overall industrial mix. By 2011, these sectors comprised 16.8 percent of the State's and 15.1 percent of the county's industrial mix.

EDUCATION AND HEALTH SERVICES (NAICS SECTORS 61-62)



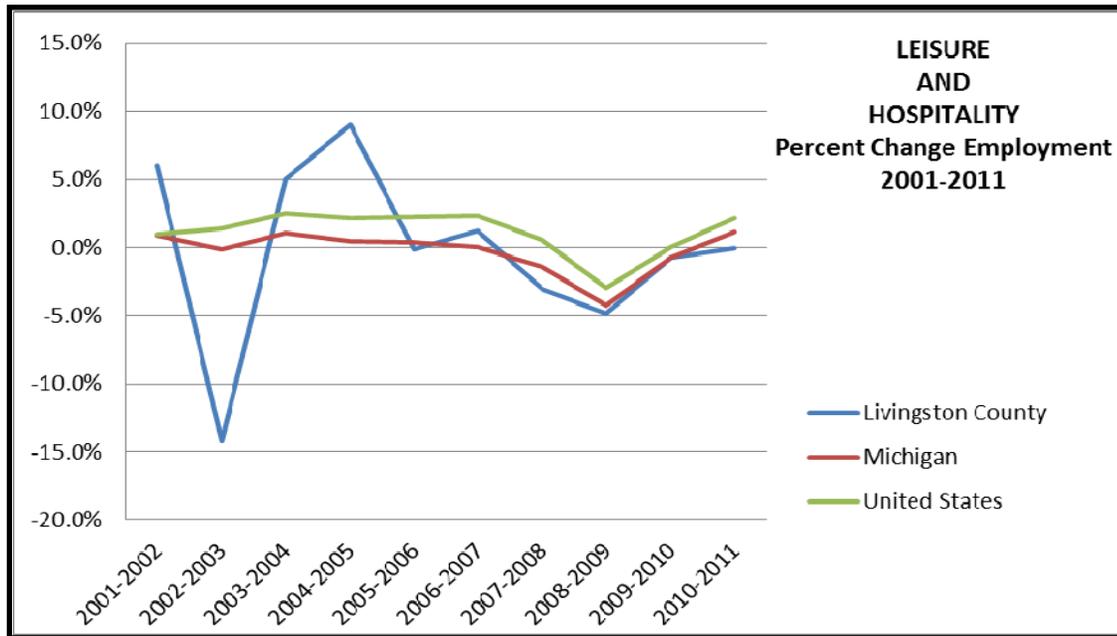
Education and Healthcare Services										
Percent Change	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Livingston County	3.8%	12.4%	6.7%	15.5%	3.7%	6.8%	0.8%	1.9%	-7.8%	5.6%
Michigan	3.6%	2.3%	2.0%	3.2%	1.7%	2.3%	1.9%	0.2%	0.7%	1.4%
United States	3.3%	2.5%	2.2%	2.5%	2.7%	3.1%	3.0%	2.0%	1.8%	2.0%

Source: Quarterly Census of Employment and Wages Data, 2013

Private Education & Healthcare – Comprises employers who provide private education for all age groups (K-12 and post secondary), as well as, private healthcare, including hospitals, medical centers, and nursing homes. Within the county, employment trends in these sectors experienced dramatic upturns and downturns between 2001-2010, with a general trend downward over the period. In comparison, employment trends in these sectors at the State and national levels tended to be somewhat level, ranging between 1 percent and 3 percent growth/decline between 2001-2011. In 2010-2011, the county saw a dramatic uptick in this sector (5.6 percent).

In 2001, these sectors comprised approximately 13 percent of the State's and 7.2 percent of the county's overall industrial mix (NOTE: educational services accounted for only 1.2 percent of the State's and 0.3 percent of the county's total within this sector group). By 2011, these sectors comprised approximately 18.2 percent (Educational services: 1.9 percent) of the State's and 12.1 percent (Educational services: 0.5 percent) of the county's overall industrial mix.

LEISURE AND HOSPITALITY (NAICS SECTORS 71-72)



Leisure and Hospitality										
Percent Change	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Livingston County	6.0%	-14.2%	5.0%	9.0%	-0.2%	1.2%	-3.0%	-4.9%	-0.8%	-0.1%
Michigan	0.9%	-0.1%	1.1%	0.4%	0.4%	0.0%	-1.4%	-4.3%	-0.8%	1.2%
United States	0.9%	1.4%	2.5%	2.2%	2.2%	2.3%	0.5%	-2.9%	0.0%	2.2%

Source: Quarterly Census of Employment and Wages Data, 2013

Leisure & Hospitality – Includes all employers who provide arts, entertainment and recreational services and also employers who provide lodging, eating and drinking services. Within the county, after experiencing approximately 6 percent growth between 2001-2002, this sector saw a dramatic decline (-14.2 percent) in 2002-2003. However, the sector gained back these short-term losses over the following two-year periods. From 2006 to 2011, employment trends in this sector largely mirrored the trends in both the State and the nation, with growth/losses ranging from between 1 percent to 4 percent over this period.

In 2001, the Arts, Entertainment, and Recreation sector comprised approximately 1.6 percent of the State's and 2.4 percent of the county's overall industrial mix, while the Accommodation and Food Service sector comprised approximately 8.6 percent of the State's and 10.3 percent of the county's overall industrial mix. By 2011, the Arts, Entertainment, and Recreation sector comprised approximately 1.5 percent of the State's and 2.3 percent of the county's overall industrial mix, while the Accommodation and Food

Service sector comprised approximately 10 percent of the State's and 10.7 percent of the county's overall industrial mix.

THE GREEN ECONOMY

Everyone today talks about going "green." But what, exactly, does that mean? The term itself is used so loosely and covers a broad array of topics, that it's hard to pinpoint precisely what makes a green company "green." In the simplest of terms, green means earth or eco-friendly. Therefore a green company is one that employs the use of practices, principles, and policies in an effort to provide a product that will positively impact the environment. This can mean they're seeking to have as little negative impact as possible or they're specifically making a product or offering a service that actually improves our environment.

The basic guideline for creating a green company is called the triple bottom line. This guideline dictates that ecological and social effects be taken into consideration and often put ahead of profits when creating a product/service. A model green company functions on three axes: people, planet and profit.

Pollution prevention. Work to minimize the amount of toxins used in a product in addition to proper mitigation of toxins at the end of the manufacturing/cultivating process.

Recycling. The reduction of waste is emphasized throughout the entire process. Waste from the actual creation of a product as well as from staff is limited. Recycled materials are employed when appropriate and the product itself needs to be easily recycled.

Water and energy conservation. The quantity of water and energy used during distribution and manufacturing are kept low. The consumption of either of these sources is done so in a reserved and strategic manner. This can prove to be particularly beneficial for a company as energy costs run high. Alternative, renewable sources of energy allow a company to keep overhead low and waste and pollution at a low level.

Sourcing. Truly green companies source their products from green suppliers and make use of natural or organic raw materials. This in turn helps support the green community as a whole, pre-established Livingston County green companies and encourages other businesses to consider going green.

Green marketing. Also called greenwashing, the term refers to spinning PR to make a company appear eco-friendly. Shoppers be forewarned. To ensure authenticity, do your own research.

Green buildings. Once an unavoidable source of negative environmental impact, by using government incentives, more green companies are building (or re-building) their offices to be environmentally friendly.

Managing e-waste. More and more green companies are educating themselves on how to properly recycle and throw out office electronics.

Transparency. Due to the recent trend of greenwashing, authentically green companies are educating their consumer about their product from beginning to end in order to help them make the decision. Details about where the product is sourced from and what vendors the company works with, is readily and eagerly shared with everyone.

Types of “Green Industries” are:

- Thrift/clothing shops.
- Green construction
- Lodging (motels, camping parks, etc.)
- Restaurants
- Transportation (ZipCar, Honda, etc.)
- Energy (solar, wind, biodiesel, etc.)

GAZELLES, NEW BUSINESSES and RESILIENCE ANALYSIS²

This report provided a snapshot of the business community in Region 1, which consists of the seven county region that makes up the Southeast Michigan Council of Governments (SEMCOG) – of which Livingston County is a member. This report focused on three primary measures of economic health: *gazelles*, *new business formation*, and *resiliency*. According to the report, these metrics are excellent indicators of the ability of the region to both create opportunity and maintain its economic output. Business information used in the report was derived from the National Establishment Time Series (NETS) database.

GAZELLE ESTABLISHMENTS

A “gazelle” establishment is an extremely fast-growing company, which maintains consistent expansion of both employment and turnover over a prolonged period. There is no single definition of what constitutes an “exceptional” growth rate, but 20 percent and more per annum is a common definition.

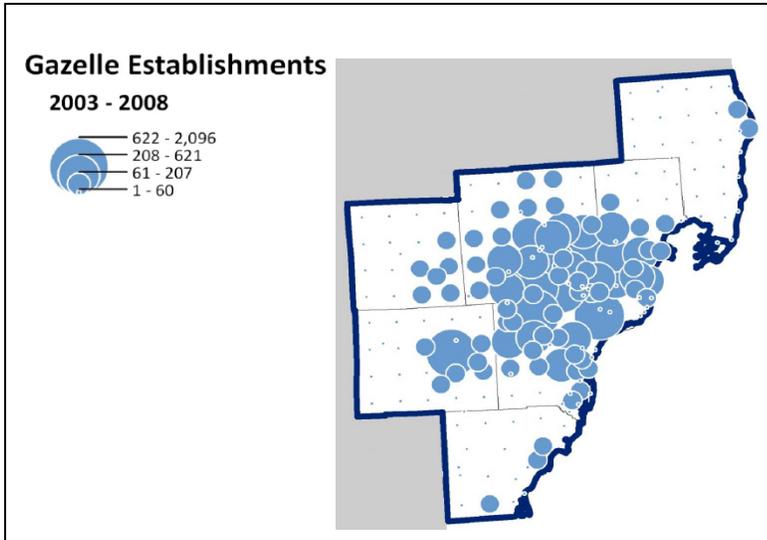
As very small companies are almost bound to grow fast from a tiny base, they are usually excluded from discussions of gazelles. Some consider as potential gazelles only fast-growing companies which have already reached some turnover threshold, for example, \$10m.

Gazelles establishments are quite scarce in most economies, comprising about 5 percent - and at the most 10 percent - of all new entrants in a given cohort entry. They are of major political and economic interest because they are seen as potential large employers and wealth creators of the future. However, research shows that most gazelles have a major problem sustaining growth over more than five years.

In 2010, the Michigan State University Land Policy Institute (LPI) produced a report entitled, “Region One: Gazelle, New Business and Resilience Analysis, Part of the Michigan Prosperity Initiative”, which examined gazelle establishments, new businesses and resilient businesses between the years 2003-2008.

Gazelle establishments for this study were defined as those companies that experienced 20 percent or greater growth in sales from 2003 to 2008. The study states that while some gazelle companies are in traditional industries, many are in emerging sectors of the economy.

² *Region One: Gazelle, New Business and Resilience Analysis, Part of the Michigan Prosperity Initiative*, Michigan State University Land Policy Institute, 2010.



Source: Michigan State University Land Policy Institute, 2010.

The map above provides a generalized distribution pattern of gazelle establishments as observed in the Southeast Michigan region. The majority of gazelles were concentrated in Wayne, Oakland and Macomb counties, with another major cluster of gazelles located in and around the City of Ann Arbor in Washtenaw County. For Livingston County specifically, the majority of gazelle establishments were concentrated primarily in the southeast quadrant of the county, in and around the city of Brighton, and along the US-23 corridor through the eastern half of the county.

Planning Region No.	Gazelle Establishments 2003 - 2008	Portion of Statewide Gazelle Establishments 2003 - 2008	Gazelle Establishments as a Portion of the Total Establishments within the Region 2003 - 2008
Region 1 - Southeast Michigan Council of Governments	22,459	44.1%	7.6%

Source: Michigan State University Land Policy Institute, 2010.

The table above provides a summary of the number of gazelle establishments that were observed in Southeast Michigan between 2003-2008. There were 22,459 gazelle establishments in the Southeast Michigan region during this time period. The Southeast Michigan region had the highest total percentage of gazelle establishments in the State during this time period, with around 44 percent of all gazelle establishments being found in this region. In addition, gazelle establishments accounted for 7.6 percent of all establishments in the region, which falls within the typical range of national findings related to the percentage of gazelles within a local economy.

Quantifying these establishments allows for deeper cluster analysis and also gives an indication of the viability of the clusters to be analyzed. The table on the following page provides details regarding gazelle establishments within the Southeast Michigan region arranged by economic sector.

Industry	Gazelle Establishments 2003 - 2008	Employment in 2008	Sales in 2008	Portion of Regional 2008 Sales
Agriculture, Forestry, Fishing and Hunting	176	1,065	\$117,652,726	27.1%
Mining	22	799	\$255,488,000	60.2%
Utilities	44	6,346	\$4,459,228,124	77.4%
Construction	2,484	25,054	\$3,855,043,550	23.1%
Manufacturing	2,184	213,236	\$51,885,818,602	56.8%
Wholesale Trade	1,752	36,284	\$12,564,748,666	35.5%
Retail Trade	2,476	39,598	\$6,889,477,171	16.6%
Transportation and Warehousing	544	16,625	\$2,858,085,280	32.4%
Information	388	8,763	\$1,048,369,093	16.6%
Finance and Insurance	1,039	22,362	\$7,250,637,987	25.2%
Real Estate and Rental and Leasing	844	11,402	\$1,212,189,160	20.8%
Administrative, Support, Waste Mgt, Remediation Svs	1,496	32,138	\$3,256,971,166	25.8%
Professional, Scientific, and Technical Services	2,925	78,723	\$8,001,629,886	29.4%
Management of Companies and Enterprises	9	113	\$27,520,000	9.2%
Educational Services	446	28,245	\$2,390,899,845	24.6%
Health Care and Social Assistance	2,106	78,312	\$6,296,186,120	35.2%
Arts, Entertainment, and Recreation	414	11,123	\$614,227,423	28.9%
Accommodation and Food Services	801	18,081	\$596,266,758	11.5%
Other Services (except Public Administration)	2,306	27,465	\$2,035,961,118	23.8%
Public Administration	3	1,406	\$132,037,200	86.4%
Total of all Gazelles	22,459	657,140	\$115,748,437,875	35.6%

Source: Michigan State University Land Policy Institute, 2010.

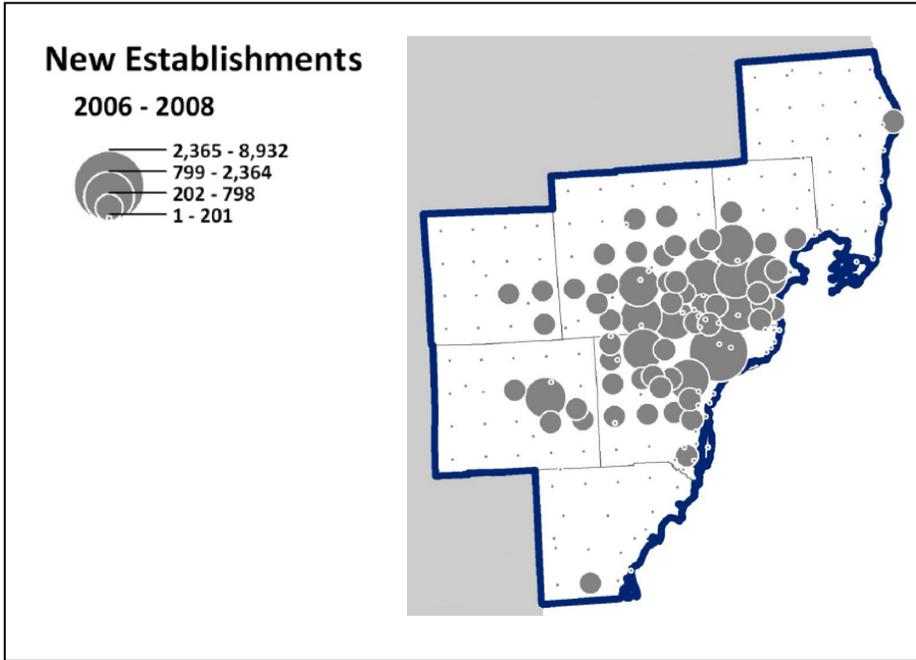
As the table above indicates, the majority of gazelle establishments in Southeast Michigan were found in the Professional, Scientific and Technical Services sector (2,925 establishments or 13 percent of the total number of regional gazelle establishments). There were also a significant number of gazelle establishments realized in the Manufacturing (2,184), Retail Trade (2,476), and Health Care and Social Assistance (2,106).

NEW ESTABLISHMENTS

The LPI report also examined the number of new establishments observed between 2006 and 2008.

New Establishments were defined in this study as those that existed in 2008, but not in 2006. Business emergence analysis evaluates the birth rate of businesses and its impact on the region. New business emergence is a sign of entrepreneurial activity.

The map on the following page provides a generalized distribution pattern of new establishments in the region over this period.



Source: Michigan State University Land Policy Institute, 2010.

As the map above indicates, the distribution pattern of new establishments followed a similar distribution pattern as realized with gazelle establishments. The majority of new establishments occurred in Wayne, Oakland and Macomb counties, as well as in and around the city of Ann Arbor in Washtenaw County. For Livingston County specifically, the majority of new establishments were found near Genoa Township and the City of Brighton and along the US-23 corridor in the eastern half of the county.

Planning Region No.	New Establishments 2006 - 2008	Portion of Statewide New Establishments 2006-2008	New Establishments as a Portion of the Total Establishments - within the Region 2006-2008
Region 1 – Southeast Michigan Council of Governments	54,598	54.4%	18.5%

Source: Michigan State University Land Policy Institute, 2010.

The table above provides a summary of the number of new establishments that were observed in Southeast Michigan between 2006 and 2008. There were 54,598 new establishments realized in the Southeast Michigan region during this time period. Just as was the case with gazelle establishments, this region had the highest total percentage of new establishments in the State during this time period, with around 55 percent of all new

establishments being in this region. In addition, new establishments accounted for 18.5 percent of all establishments in the region.

The table below provides details regarding new establishments within the Southeast Michigan region arranged by economic sector during the study time period.

Industry	New Establishments 2006 - 2008	Employment in 2008	Sales in 2008	Portion of Regional 2008 Sales
Agriculture, Forestry, Fishing and Hunting	213	307	\$18,564,100	4.3%
Mining	22	69	\$7,125,999	1.7%
Utilities	58	176	\$49,059,899	0.9%
Construction	5,384	9,003	\$952,334,508	5.7%
Manufacturing	1,850	13,854	\$1,789,981,127	2.0%
Wholesale Trade	2,239	6,742	\$1,194,591,539	3.4%
Retail Trade	5,279	14,288	\$1,588,585,599	3.8%
Transportation and Warehousing	1,722	4,799	\$372,106,098	4.2%
Information	1,465	4,294	\$321,256,800	5.1%
Finance and Insurance	3,184	8,266	\$878,012,219	3.1%
Real Estate and Rental and Leasing	2,571	6,807	\$532,790,435	9.2%
Administrative, Support, Waste Mgt, Remediation Svs	10,053	18,374	\$1,381,758,760	10.9%
Professional, Scientific, and Technical Services	7,288	20,353	\$1,583,456,132	5.8%
Management of Companies and Enterprises	268	593	\$49,911,700	16.6%
Educational Services	541	2,726	\$128,578,156	1.3%
Health Care and Social Assistance	5,025	18,925	\$893,364,190	4.9%
Arts, Entertainment, and Recreation	940	2,422	\$92,888,169	4.4%
Accommodation and Food Services	1,474	9,138	\$348,218,000	6.7%
Other Services (except Public Administration)	4,902	11,649	\$588,553,431	6.9%
Public Administration	120	4,618	\$117,100	0.1%
Total of all Startups	54,598	157,403	\$12,771,253,961	3.9%

Source: Michigan State University Land Policy Institute, 2010.

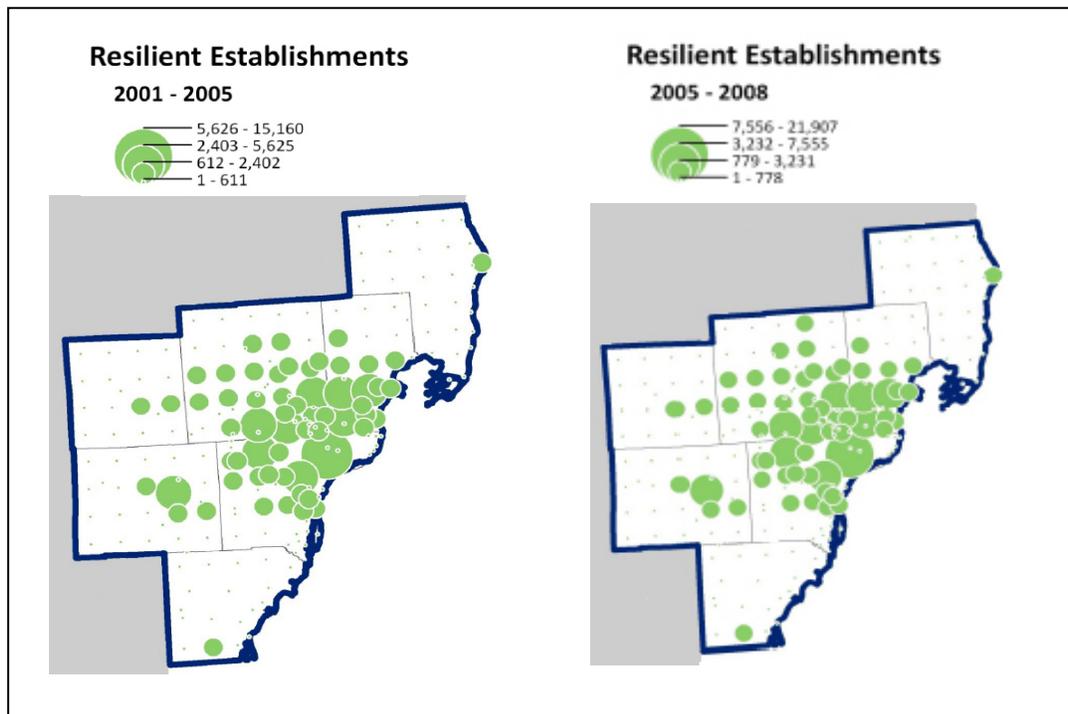
The table shows that the majority of new establishments in the Southeast Michigan region were in the Administrative, Support, Waste Management and Remediation Services economic sector (10,053 new establishments, or 18.4 percent of all new establishments observed in the region). In addition, a high percentage of new establishments were in the Professional, Scientific and Technical Services sector (7,288 establishments, or 13.3 percent of the regional total), the Retail Trade sector (5,279 establishments, or 9.7 percent of the total) and Health Care and Social Assistance sector (5,025 establishments, or 9.2 percent of the total).

RESILIENT ESTABLISHMENTS

The final aspect of economic growth and stability that was examined in the LPI report was Resilient Establishments.

Resilient businesses were defined in the report as those which retained at least 90 percent of their pre-recession employment since 2001 (measured in two increments – 2001 to 2005 and 2005 to 2008). The study stated that as the global economic downturn has had severe impacts in the US and in Michigan, these resilient businesses may be part of long-term strategies for economic health.

The map below depicts the generalized distribution pattern of resilient establishments in the Southeast Michigan region for the two study time periods.



Source: Michigan State University Land Policy Institute, 2010.

As the map above indicates, the distribution pattern of resilient establishments followed a similar distribution pattern as realized with gazelle and new establishments. The majority of resilient establishments occurred in Wayne, Oakland and Macomb counties, as well as in and around the city of Ann Arbor in Washtenaw County. For Livingston County specifically, the majority of new establishments were found near Genoa Township and the City of Brighton and along the US-23 corridor in the eastern half of the county.

The table on the following page provides a summary of the number of resilient establishments that were observed in Southeast Michigan for the two study time periods, between 2001-2005 and 2005-2008.

Planning Region No.	Resilient Establishments		Portion of Statewide Resilient Establishments		Resilient Establishments as a Portion of the Total Establishments within the Region	
	2001-2005	2005 -2008	2001-2005	2005 -2008	2001 - 2005	2005 -2008
Region 1 – Southeast Michigan Council of Governments	119,498	186,688	44.3%	46.3%	47.5%	63.3%

Source: Michigan State University Land Policy Institute, 2010.

As the table indicates, there were a total of 119,498 resilient establishments realized in the Southeast Michigan region between the years 2001 and 2005. This number rose to 186,688 establishments between the years 2005 and 2008 (about a 56 percent increase). This region had the highest percentage of resilient establishments in the State during both time periods (44.3 percent and 46.3 percent respectively). The percentage of resilient establishments as a portion of total establishments in the region stood at 47.5 percent, nearly half, between 2001 and 2005. The percentage increased dramatically between 2005 and 2008 (15.8 percent increase), with over 63.3 percent of all establishments within the region being characterized as resilient establishments.

The table below provides details regarding resilient establishments within the Southeast Michigan region arranged by economic sector during the study time periods.

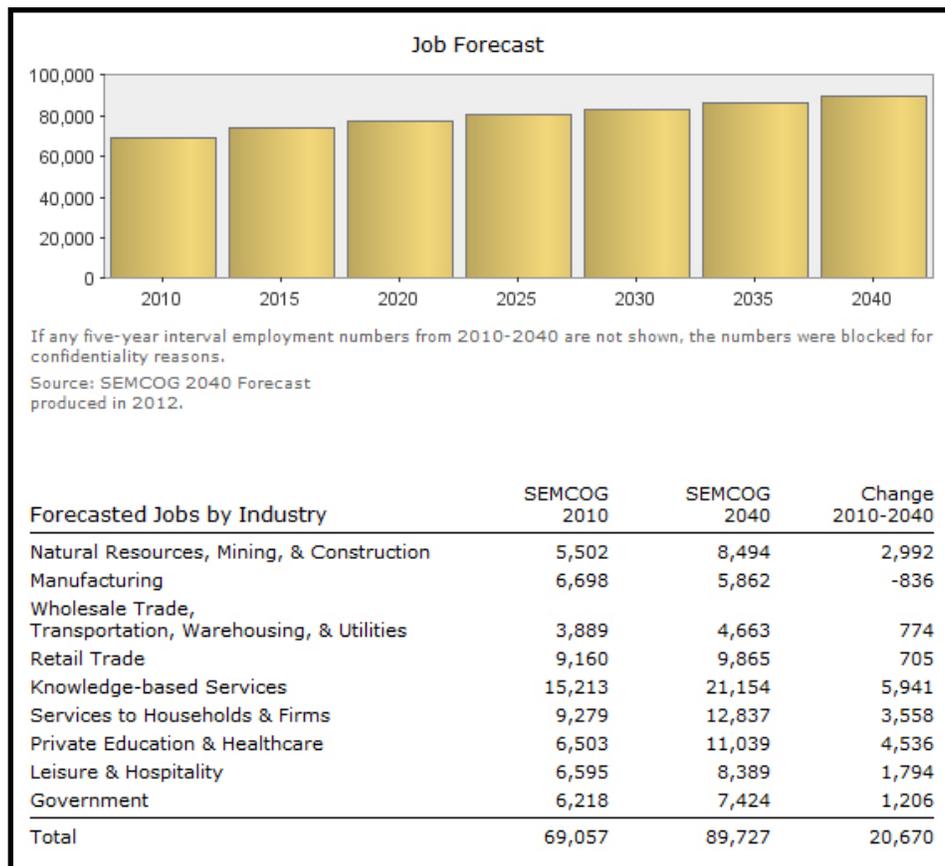
Industry	Resilient Establishment		Employment		Sales (in millions)		Portion of Regional 2005 Sales	
	2001-2005	2005-2008	2001-2005	2005-2008	2005	2008	2005	2008
Ag, Forestry, Fishing and Hunting	1,335	1,756	4,375	5,226	\$307.9	\$335.8	72.7%	77.4%
Mining	106	159	1,571	1,926	\$340.5	\$405.5	82.8%	95.6%
Utilities	129	170	7,197	7,640	\$3,858.4	\$4,842.7	82.8%	84.1%
Construction	13,146	21,206	71,782	100,132	\$9,858.2	\$12,303.8	63.5%	73.8%
Manufacturing	8,673	12,073	319,153	403,863	\$41,871.1	\$71,745.6	67.6%	78.6%
Wholesale Trade	6,964	10,077	77,877	107,709	\$18,935.2	\$25,714.3	62.9%	72.5%
Retail Trade	15,287	23,135	175,903	221,814	\$28,692.1	\$35,285.4	75.1%	84.7%
Transportation and Warehousing	2,843	4,500	47,933	66,342	\$4,018.8	\$6,113.0	60.8%	69.3%
Information	2,172	3,925	33,984	44,786	\$3,355.1	\$4,723.2	59.8%	74.9%
Finance and Insurance	4,555	8,153	58,864	85,058	\$25,206.0	\$18,714.4	78.2%	65.0%
Real Estate and Rental and Leasing	5,865	9,079	37,459	54,382	\$3,171.0	\$4,387.6	63.7%	75.4%
Admin, Support, Waste Mgt, Remed. Svs	6,526	15,272	72,193	114,620	\$5,628.3	\$8,786.2	59.4%	69.5%
Professional, Scientific, and Tech Svs	15,124	24,461	149,250	215,879	\$13,996.1	\$19,981.4	62.1%	73.4%
Mgt of Companies and Enterprises	115	288	708	1,507	\$143.2	\$169.5	60.9%	56.4%
Educational Services	2,591	3,525	105,722	134,909	\$6,219.2	\$8,813.3	72.4%	90.6%
Health Care and Social Assistance	10,902	15,901	168,039	224,642	\$11,721.5	\$14,929.9	69.1%	83.4%
Arts, Entertainment, and Recreation	2,572	3,982	25,519	39,398	\$12,699.2	\$17,979.1	52.4%	84.5%
Accommodation and Food Services	5,491	7,280	101,837	132,614	\$3,323.0	\$4,253.6	71.1%	82.2%
Other Services (except Public Admin)	14,365	20,716	80,868	105,860	\$5,082.1	\$6,477.7	63.4%	75.7%
Public Administration	737	1,030	60,251	73,634	\$14.1	\$146.1	10.2%	95.5%
Total	119,498	186,688	1,600,485	2,141,941	\$187,012.1	\$249,927.6	68.3%	76.8%

Source: Michigan State University Land Policy Institute, 2010.

The table shows that the majority of resilient establishments in the Southeast Michigan region were found in the Retail trade economic sector (15,287 new establishments, or 12.8 percent of all new establishments observed in the region) between 2001 and 2005. In addition, a high percentage of new establishments were also found in the Professional, Scientific and Technical Services sector (15,124 establishments, or 12.7 percent), and Health Care and Social Assistance sector (10,902 establishments, or 9.1 percent) between 2001 and 2005. During the following study time period, the highest percentage was realized in the Professional, Scientific and Technical Services sector (13.1 percent), followed closely by the Retail Trade sector (12.4 percent).

FORECASTED JOB GROWTH

The table below provides an overview of forecasted job growth for Livingston County between 2010 and 2040, as determined by the Southeast Michigan Council of Governments (SEMCOG) in 2012.



Source: SEMCOG and U.S. Census Bureau American Factfinder, 2010

SEMCOG predicts that overall, the county will realize a 30 percent increase in jobs (20,670 jobs) over the 30-year period (1 percent growth per year). It is anticipated that the Knowledge-based services industry (built upon the following NAICS sectors: Information; Finance and Insurance; Real Estate, Rental, and Leasing; Professional, Scientific, and Technical Services; and Management of Companies and Enterprises) will see the largest increase in the number of jobs (5,941), followed closely by the Private Education and Healthcare (comprised of employers who provide private education for all age groups (K-12 and post secondary), as well as private healthcare, including hospitals, medical centers, and nursing homes), with an increase of 4,536 jobs. The Manufacturing industrial sector will see a decrease of 836 jobs over the period.

In comparison, another report, regularly performed by the State of Michigan Department of Technology, Management and Budget tracks employment forecasts as well. This report tracks changes in employment by major occupational categories, rather than broad industrial sectors. The table below provides the most recent employment forecasts for the Livingston and Washtenaw County areas for the period 2008 to 2018.

Employment Forecast by Major Occupational Category - 2008 - 2018 - Livingston - Washtenaw County Areas				
Occupational Category	2008	2018	Employment Growth	
			Number	Percent
Total, All Occupations	240,775	263,215	22,440	9.3%
Management	13,615	14,540	925	6.8%
Professional	61,090	69,345	8,255	13.5%
Health Care	18,550	23,020	4,470	24.1%
Service	40,425	44,520	4,095	10.1%
Sales	27,025	28,615	1,590	5.9%
Administrative Support	34,845	37,430	2,585	7.4%
Farming, Forestry and Fishing	990	995	5	0.5%
Construction and Repair	15,915	17,245	1,330	8.4%
Production	17,265	16,135	-1,130	-6.5%
Transportation	11,055	11,365	310	2.8%

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

The table indicates that overall, the total number of employment in all occupations in this two-county region will increase by 22,440 jobs (9.3 percent increase) over the period. Healthcare occupations are expected to realize the largest percent increase over the period at 24 percent, followed by Professional occupations (13.5 percent) and Service occupations (10.1 percent). Professional occupations are expected to see the largest increase in the overall number of jobs in the area at 8,255 new jobs. Production jobs on the otherhand are expected see a decrease of 6.5 percent and a loss of 1,130 jobs over the same period.

The following table provides an overview of the anticipated ten fastest growing occupations in the two-county area.

Fastest Growing Occupations - 2008 - 2018 - Livingston - Washtenaw County Areas		
Occupations	Employment Change	
	Number	Percent
Network Systems and Data Communications Analysts	190	53.0%
Home Health Aides	560	51.2%
Fitness Trainers and Aerobics Instructors	110	36.5%
Dental Hygienists	175	34.4%
Dental Assistants	225	33.1%
Medical Assistants	325	32.6%
Training and Development Specialists	105	32.3%
Market Research Analysts	115	32.3%
Computer Software Engineers, Systems Software	240	31.4%
Medical Scientists, Except Epidemiologists	190	31.1%

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

Employment in computer network systems and data communications is expected to see the largest percentage change in employment over the period (53 percent), followed closely by home health aid professions (51.2 percent). Of the top ten fastest growing occupations over the period, home health aid occupations are expected to see the largest increase in the number of jobs as well (560 jobs). Overall, jobs in the medical, dental and computer analyst occupational categories are expected to realize the greatest percent increases over the period.

The table below indicates the top ten occupations that are expected to garner the highest demand and highest wages in the two-county region over the period.

High Demand - High Wage Occupations - 2008 - 2018 - Livingston - Washtenaw County Areas			
Occupations	Growth Rate	Annual Openings	Hourly Wage
Computer Software Engineers, Systems Software	31.4%	30	\$41.55
Computer Software Engineers, Applications	30.2%	33	\$40.07
Medical Scientists, Except Epidemiologists	31.1%	31	\$34.86
Network and Computer Systems Administrators	25.2%	33	\$39.52
Dental Hygienists	34.4%	29	\$32.74
Registered Nurses	23.4%	175	\$29.48
Sales Managers	17.1%	29	\$49.01
Accountants and Auditors	16.2%	60	\$31.86
Logisticians	19.0%	30	\$31.24
Public Relations Specialists	22.9%	29	\$28.53

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

Employment in computer software engineering, medical science, and dental hygiene head the list of high demand occupations through the year 2018 (all over 30 percent growth). Also in high demand will be network and computer systems administrators (25 percent), registered nurses (23 percent) and public relations specialists (23 percent). The registered nursing occupational category is also supposed to see the largest number of openings on an annual basis (175 jobs per year), followed closely by accountants and auditors (60 jobs per

year). Most of the other occupations in this category are expected to see approximately 30 openings per year. Of those occupations in the highest demand, sales management positions are expected to see the highest hourly wage at \$49 per hour, followed by computer software engineers at between \$40 and \$42 per hour.

The table below indicates the top ten occupations expected to be the highest growth in association with possession of at least a bachelor's degree.

High Growth Jobs with at Least a Bachelor's Degree - 2008 - 2018 - Livingston - Washtenaw County Areas			
Occupations	Numeric Job Growth	Percent Job Growth	Hourly Wage
Computer Software Engineers, Applications	255	30.2%	\$40.07
Computer Software Engineers, Systems Software	240	31.4%	\$41.55
Computer Systems Analysts	225	23.3%	\$40.52
Network and Computer Systems Administrators	195	25.2%	\$39.52
Network Systems and Data Communications Analysts	190	53.0%	\$36.47
Medical Scientists, Except Epidemiologists	190	31.1%	\$34.86
Instructional Coordinators	175	22.1%	\$30.60
Management Analysts	130	15.5%	\$39.48
Market Research Analysts	115	32.3%	\$28.62
Civil Engineers	100	24.3%	\$37.64

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

The data shows that computer software engineers and computer system analysts will realize the largest growth in the number of jobs (between 225 and 255 jobs) over the period. Network and computer systems analysts along with medical scientists should see a total increase of approximately 190 jobs. Civil engineers, market researchers and management analysts are expected to see an overall increase of between 100 and 130 jobs over the period.

The table below indicates the top ten occupations expected to be the highest growth in association with possession of at least an associate's degree or work experience.

High Growth Jobs with an Associate's Degree or Work Experience - 2008 - 2018 - Livingston - Washtenaw County Areas			
Occupations	Numeric Job Growth	Percent Job Growth	Hourly Wage
Registered Nurses	995	23.4%	\$29.48
Executive Secretaries and Administrative Assistants	380	11.5%	\$20.77
Licensed Practical and Licensed Vocational Nurses	200	26.7%	\$20.66
Dental Hygienists	175	34.4%	\$32.74
Self-Enrichment Education Teachers	175	28.9%	\$22.84
First-Line Sup/Mgrs of Const Trades and Extraction Workers	105	13.9%	\$32.21
Heating, Air Conditioning, Refrigeration Mechanics & Installers	75	21.5%	\$25.69
Physical Therapist Assistants	60	45.2%	\$21.89
Civil Engineering Technicians	50	15.5%	\$24.92
Insurance Sales Agents	50	12.9%	\$25.09

Source: DTMB, Bureau of Labor Market Information and Strategic Initiatives, 2012

The table indicates that the registered nursing occupation will expect to realize nearly 1000 new jobs over the period (23 percent job growth). The growth in this occupational category will be nearly three times that of the occupation with next largest numeric job growth, that being executive secretaries and administrative assistants (380 jobs, 11.5 percent growth). Once again, occupations in the medical, dental fields dominate this category. The field of physical therapy is expected to see the largest percentage gain in employment within this top ten, at 45 percent (60 jobs). Supervisors and managers of construction trades, along with dental hygienists and registered nurses should garner the highest hourly wages of this grouping, earning an average of between \$29 and \$32 per hour.



COUNTY BUSINESS SUPPORT NETWORK PROFILE

Livingston County is fortunate to be served by a comprehensive and coordinated network of business support activities, aimed at both existing and potential employers and employees. Some of the services available from these entities are profiled in this section.

ANN ARBOR SPARK

(www.annarborusa.org)

Between 2012 and 2015, SPARK will partner with the Livingston County Economic Development Corporation (LCEDC). Within this partnership, SPARK will provide a full suite of its business attraction and business development services to the Livingston County region. In turn, the LCEDC will provide funding, local oversight, and community representation in the partnership. SPARK staffs a satellite office in the Brighton Chamber of Commerce, and a satellite office at the Howell Chamber of Commerce.

THE LIVINGSTON COUNTY ECONOMIC DEVELOPMENT COUNCIL

Ph: (517) 546-0822 (<http://www.livingstonedc.com>)

The Livingston County Economic Development Council (LCEDC) was founded by business leaders in 1984 as a private, nonprofit corporation. Its mission is to retain, attract and expand key businesses in the county. Oversight is provided by a Board of Directors made up of representatives of both the public and private sectors. The EDC is funded by private business contributions, as well as service contracts with local governments and the Livingston County Board of Commissioners.

REGIONAL PROSPERITY INITIATIVE

(<http://www.michigan.gov/dtmb/0,5552,7-150-66155---,00.html>)

The Regional Prosperity Initiative is a voluntary competitive grant process that is included in the Governor's FY 2014 Executive Budget Recommendation to encourage local private, public and non-profit partners to create vibrant regional economies. The legislature approved the recommended process and the Regional Prosperity Initiative was signed into law as a part of the FY 2014 budget (59 PA 2013).

Existing State Designated Planning Regions and Metropolitan Planning Organizations are eligible to apply for grants from the Regional Prosperity Initiative. However, they will not

qualify for any funding at any level unless they are collaborating with business and non-profit representatives as well as representatives from local and regional economic development organizations, workforce boards, adult education providers and the higher education community. Livingston County is located in the Southeast Michigan Prosperity Region.

ADVANCE MICHIGAN

(<http://www.eda.gov/challenges/imcp/>)

The Community

The heart the nation's automotive industry rests in the 13-county southeast Michigan region. The Advance Michigan region currently produces 22% of the vehicles made in America, and, at \$14 billion a year, over 70% of the U.S. total auto R&D spending is invested in the region. Through the *Advance Michigan* initiative over thirty partner organizations are banding together to build the region's capabilities to master the next frontier of automotive technology and manufacturing – vehicles that communicate with each other and with the open road to carry their passengers more safely and efficiently to their destinations.

The Vision

Advance Michigan will position its 13-county region in southeastern Michigan at the forefront of the automotive and digital technologies behind connected cars and infrastructure, technologies that will lead to a step-change in driving safety and efficiency. The initiative's partners will deepen already significant workforce partnerships through \$177 million in training, while connecting these efforts across all stages of skills development from high school on up. And the initiative will leverage over 50 labs and research facilities across the region to develop and deploy across its supply chains these new connected-vehicle technologies.

The Strategy

Workforce Development - *Advance Michigan* and its partners will invest \$177 million in training and workforce development activities to upgrade the region's talent infrastructure, attract a pipeline of younger workers, and develop curriculum and training in the latest manufacturing technologies, including training to upgrade the skills of incumbent workers. *Advance Michigan* will also invest in longitudinal workforce data tracking systems to help target its training efforts.

Supplier Networks – To ensure that the automotive industry remains at the vanguard of advanced manufacturing, *Advance Michigan* will make connected-vehicle technologies a core focus of the Pure Michigan Business Connect (PMBC) partnership and within other regional economic development and other non-profit partner groups. As new connected-vehicle technologies and advances in lightweight metals are developed in the region,

Advance Michigan will map the availability of capabilities related to these technologies in its supply chains and further their deployment through new capabilities at regional colleges and universities and the development of an incubator to connect entrepreneurs to these new technologies.

Research and Innovation – The *Advance Michigan* region has over 50 labs and has received over \$300 million in automotive research projects at its universities in the last five years. To make sure Michigan remains the nation’s automotive R&D hub, *Advance Michigan* will align university and/industry R&D including through the development of a research capabilities translator for industry seeking to navigate the university research landscape, the launch of R&D competitions requiring multi-partner collaborations, and the creation of internships, co-ops, and apprenticeships in company research.

Infrastructure – Increased collaboration between the state, *Advance Michigan*, and private enterprise will support further infrastructure and site development by working to eliminate blight and to speed the redevelopment of vacant manufacturing sites, to upgrade the region’s transportation infrastructure to allow for connected vehicles and to close infrastructure maintenance gaps. *Advance Michigan*’s plan calls for laying 2,287 miles of fiber-optic infrastructure to the deployment of connected-vehicles.

Trade and International Investment – To increase trade and international investment opportunities *Advance Michigan* will work to attract skilled immigrants; increase the number and frequency of international trade missions, increase cross border trade with Canada; and market the region to increase foreign direct investment.

Operational Access and Capital Improvement – Michigan ranks 15th in the nation for venture capital investment, a position that *Advance Michigan* proposes to improve through securing additional capital for existing State Small Business Credit Initiative and the creation of a new \$50 million venture capital fund focused on automotive technologies. In addition, *Advance Michigan* will expand services that reduce the cost of doing business for small manufacturers and efforts to capitalize manufacturing energy efficiency upgrades in the region, lowering energy costs.

REDEVELOPMENT READY COMMUNITY® (RRC) PROGRAM

(<http://www.michiganbusiness.org/RRC>)

RRC is a statewide program that certifies communities who actively engage stakeholders to vision and plan for the future. An RRC certification signals to business owners, developers and investors that the community has removed development barriers by building deliberate, fair and consistent processes. Certified Redevelopment Ready Communities attract investment to create thriving places where people want to live work and play.

The RRC best practices were developed by experts in the public and private sector and communities are evaluated based on nurturing the potential of a community to meet the unique needs of businesses and residences.

Once a community has implemented suggested best practices and is awarded certification the RRC program together with the MEDC will assist with promotion and marketing of up to three sites ready for redevelopment.

The chosen sites will be prime for new investment because they are located within a community that has effective policies, efficient processes and broad community support.

There are several points to ponder that are proven “best practices” for those communities that are successful in attracting development. They include:

1. Is your community friendly and open to potential developers?
2. Do you have zoning policies that are easily accessible to potential developers?
3. Is your development “review process” efficient, timely and easy to understand?
4. Have you identified your top prospective sites, discussed potential best uses for the site(s) and made sure your zoning allows for that “best use”?

MICHIGAN STATE UNIVERSITY LAND POLICY INITIATIVE (LPI)

(www.landpolicy.msu.edu)

At the core of Michigan State University’s Land Policy Institute's (LPI) mission is to resource policy makers at the federal, state, and local level with science-based tools and solutions that help build a better quality of life, strengthen the economy, and protect the environment in ways that are fair to all.

The Institute is fundamentally committed to Michigan. Recognizing that land use policies are pivotal to the state's success, it engages scientists from MSU, other universities in Michigan, and universities outside Michigan to develop strategies and policy tools to position Michigan for the future based on the principles of strategic growth. In everything the LPI does, it considers economic, social, and environmental issues. It encourages collaboration among land use researchers, policy makers, and community organizations.

FRONTAL LOBE

Ph: (517) 618-9506 (<http://www.workfrontallobe.com/>)

Frontal Lobe is a membership-based coworking space & private offices located in downtown Howell that caters to entrepreneurs and small business owners who need a collaborative and creative space to run their businesses. The space provides all the

amenities of an office, servicing the needs of many types of business owners including a shared conference room, meeting spaces and printer/copier access.

MICHIGAN SMALL BUSINESS DEVELOPMENT CENTER

Ph: (810) 227-5086 (<http://www.SBDCMichigan.org>)

The Small Business Development Center (SBDC) is a part of the U.S. Small Business Administration. The SBDC's primary responsibility is to provide quality, no-cost counseling, training, and research assistance to small businesses in Livingston County. Each year, the SBDC provides about 1,000 hours of counseling, training and on-site services, acting as a clearing house for information on financing, regulations, marketing and training. The SBDC is also working in partnership with the U.S. Department of Commerce for direct access to trade specialists.

LIVINGSTON COUNTY WORKFORCE DEVELOPMENT COUNCIL

Ph: (517) 546-7450 (<http://www.lcmw.org>)

The Livingston County Workforce Development Council is responsible for overseeing federal and state job training and employment programs. It is one of 25 workforce boards in Michigan charged with implementing the Michigan Works! system of integrated services for employers and job seekers. Members are appointed by the Livingston County Board of Commissioners and certified annually by the Governor. The Council is "driven" by business members, who constitute a majority of the membership. These business representatives must ensure that the Council establishes policies that integrate all workforce development programs and targets them to support economic development at the state and local level.

LIVINGSTON BUSINESS AND EDUCATION ALLIANCE (LBEA)

(http://www.internlivingston.org/about_lbea.html)

The Livingston Business and Education Alliance (LBEA) aims to better connect business and education to develop and retain talent in our region. The LBEA functions as the Educational Advisory Group and the Youth Council for the Livingston County Workforce Development Council. Members are appointed by the Workforce Development Council and serve three-year terms.

The mission of the Livingston Business and Education Alliance is to foster collaboration to "keep local talent local." The vision of the Livingston Business and Education Alliance is to create a culture of educational and industry support in which educators and business leaders routinely engage in creative dialogue and planning. As a result of its efforts, LBEA expects the following results:

- Livingston County economic growth and development is enhanced.
- Businesses gain talented and skilled employees.
- Educational opportunities for students and retrained workers are expanded.
- Active and mutual support of internships, work experience, and other forms of life-long learning is evidenced.

Both employers and students have a broad spectrum of vocational education programs from which to choose including: apprenticeships, paid and unpaid internships, job shadowing, facility tours, co-op and work-based learning.

MICHIGAN WORKS! LIVINGSTON SERVICE CENTER

Ph: (517) 546-7450 (<http://www.michiganworks.org>)

The Workforce Development Council oversees the Michigan Works! Livingston Service Center, which is part of the statewide Michigan Works! system of one-stop service centers. Located in Howell, Michigan, in the same location as M-TEC and the EDC, Michigan Works! offers a full range of employment related services to help employers find skilled workers and to help job seekers find satisfying careers. The partnership with EDC and M-TEC facilitates a one-stop location for business development. Support services for job seekers, include:

- Career counseling
- Vocational training
- Job training grants and training programs

Support services are also available to employers, including:

- Employee recruitment, assessment, training and retention
- Scheduling of Job Fairs and other recruiting events
- Screening and referral of trainees and job candidates
- Information on tax credits, wage subsidies and other hiring incentives
- Labor market information
- ADA information provided by Michigan Rehabilitation Services staff

Another of the Workforce Development Council's primary activities is helping local businesses apply for Economic Development Job Training grants, which are available through the Michigan Economic Development Corporation. This grant program offers customized training to Michigan manufacturers and other base industries. Locally, these grants are administered by the Workforce Development Council or by vocational schools.

LIVINGSTON COUNTY CHAMBERS OF COMMERCE

Livingston County is served by: (1) the Howell Area Chamber of Commerce; (2) the Greater Brighton Area Chamber of Commerce; (3) the Pinckney, Lakeland, Hamburg Chamber of Commerce; (4) the Whitmore Lake Chamber of Commerce; and (5) the Hartland Area Chamber of Commerce. These membership organizations share a common mission: that is, to create a favorable business environment and, in the process, expand local investment, job opportunities, and economic activity. This is accomplished through a variety of business support activities, including help with networking, marketing, referrals, recruitment, and training.

Howell Area Chamber of Commerce

Ph: (517) 546-3920 (<http://www.howell.org>)

Greater Brighton Area Chamber of Commerce

Ph: (810) 227-5086 (<http://www.brightoncoc.org>)

Pinckney, Lakeland, Hamburg Chamber of Commerce

Ph: (810) 227-5086 (<http://www.plhcoc.org>)

Whitmore Lake Chamber of Commerce

Ph: (810) 227-5086 (<http://www.whitemorelakecoc.org>)

Hartland Area Chamber of Commerce

Ph: (810) 632-9130 (<http://www.hartlandchamber.org>)

THE LIVINGSTON REGIONAL MICHIGAN TECHNICAL EDUCATION CENTER (M-TEC)

Ph: (517) 548-4589 (<http://www.livingstonmtec.org>)

Located in the Trans West Industrial Park in Howell Township, the Livingston Regional M-TEC is a joint partnership between the Michigan Economic Development Corporation, the Livingston County Workforce Development Council and Mott Community College. The Economic Development Council (EDC) of Livingston County also played a major role in its creation. M-TEC is run by an Executive Director and staff employed by Mott Community College (MCC). An M-TEC Board made up of local business and other community leaders provides input and guidance.

The Livingston Regional M-TEC, opened in 2001, is an organization servicing the training needs of the businesses and workers in Livingston County, Michigan and the surrounding area. Training activities, which are delivered in a manner flexible to both businesses and workers, are performed at the centrally-located Livingston county site, or at the customer's facilities.

LIVINGSTON APPLIED TECHNOLOGY EDUCATION CONSORTIUM

Ph: (517) 546-5550 (<http://www.latec.us/>)

The Livingston Applied Technology Education Consortium (LATEC) is a cooperative effort between the Livingston Educational Service Agency (LESA) and the Brighton, Fowlerville, Hartland, Howell and Pinckney school districts. Through this initiative, LESA administers Applied Technology (formerly known as vocational education) programs at the five high schools in its service area. Over 2,700 students are enrolled in these vocational programs, which are closely coordinated. LATEC provides a wide range of student, staff and business services. Staff services include program, curriculum and professional development, as well as long range planning, assessment and technical assistance. Student services include:

- Coordinating programming and transportation among participating high schools
- Providing opportunities for placement in internships, apprenticeships and careers.
- Developing agreements with area colleges that enable high school students to earn college credit.

Applied Technology students have earned scholarships and regional, state and national honors in competitions sponsored by: Business Professionals of America, Vocational Industrial Clubs of America, National Robotics Institute, DECA-Association of Marketing Students, AAA Ford, Lansing Community College, and Lawrence Technological University. Students are able to transfer credit earned in some Applied Technology programs to local colleges and universities. Work-based learning experiences and cooperative education are an integral component of all Applied Technology programs. Students are placed with local employers in positions that are directly related to their course work.

Livingston County Learning for Life, a Career Preparation program, is actively supported by the Workforce Development Council and over 500 Livingston County employers. This initiative provides career exposure and work-based learning opportunities for all Livingston County high school students.

LATEC also coordinates the Community/Adult Education programs in the five school districts mentioned above. Through this effort, the consortium provides the following services:

- Facilitating Adult Education and Economic Development employee training/retraining grants.
- Offering a broad spectrum of courses, ranging from basic math and communication to highly specialized technical training (for example, blueprint reading, CAD/CAM, and robotics).
- Assistance with planning, establishing and implementing customized employer training programs.
- Providing companies with State of Michigan certified instructors who are specialists in their respective fields.

LIVINGSTON ENTREPRENEURIAL GROUP UNITED FOR PROSPERITY (LEG UP!)

(<http://www.clearyentforum.com/>)

LEGUP! is a collaborative effort between Cleary University, SCORE, the SBTDC, and the Howell, Brighton, and Hartland Chambers of Commerce, and is designed to help provide a "leg up" toward future success. Livingston Entrepreneurs Group United for Prosperity (LEGUP!) brings together new and established entrepreneurs for educational, networking and resource opportunities.

SCORE

(<http://www.score.org/mentors>)

SCORE provides free and confidential business advice and counseling tailored to meet the needs of small businesses. SCORE provides mentors, counseling, tools and workshops for start-ups and existing entrepreneurs.

CONNECT MICHIGAN

(<http://www.connectmi.org/>)

As of 2013, Livingston County is the fifth Michigan community and 10th in the nation to become certified as a “Connected Community” through the Connect Michigan partnership. The designation means the county has undergone each of the necessary steps to collect and analyze data, as well as recommend action items.

Connect Michigan is a subsidiary of Connected Nation and operates as a nonprofit in the state of Michigan. It initially was funded by stimulus dollars. Connect Michigan is a subsidiary of Connected Nation and operates as a non-profit in the state of Michigan. Connect Michigan partnered with the Michigan Public Service Commission to engage in a comprehensive broadband planning and technology initiative as part of National effort to map and expand broadband. The program began by gathering provider data to form a statewide broadband map and performing statewide business and residential technology assessments, but has since progressed to working with communities on community plans. Bolstered by benchmarking data that has been gathered through Connected Nation's mapping and market research, the Connected Community Engagement program is drilling down to the regional and local level to facilitate community technology planning.

PUBLIC LIBRARY RESOURCES

A number of libraries in the county offer centers that provide a core collection of business related materials and support, which include marketing, demographic and competitive intelligence, information specialists, and access to consultants such as SCORE counselors. The centers also offer Internet access, Office suite of products, printing, faxing, copying, scanning, skypping, and a designated meeting and work space.

Howell Carnegie District Library Business Resource Center

(http://www.howelllibrary.org/business_investing.htm)

Brighton District Library Business & Finance Resources

(<http://brightonlibrary.info/business>)

Cromaine Library Business Resources

(<http://www.cromaine.org/small-business-michigan>)

Department of Education-Michigan eLibrary Business and Jobs Gateway

(<http://mel.org/index.php?P=SPT--BrowseResourcesBusiness&ParentId=832>)



COUNTY CEDS ECONOMIC DEVELOPMENT VISION, GOALS AND OBJECTIVES

A strategic plan is more than a list of problems to be solved or opportunities to be pursued. It begins with a realistic vision, or direction, for the future that is widely shared. However, if it is to be achieved, this vision must be translated into realistic goals and into actions to accomplish these goals. These goals and actions are the core of an effective strategic plan.

VISION OF ECONOMIC DEVELOPMENT IN LIVINGSTON COUNTY

The sustained creation of community wealth through the retention, expansion and development of diversified business opportunities that are compatible with the natural environment, existing land uses, infrastructure and the local labor force, and which enrich the County's quality of life.

BUSINESS RETENTION, EXPANSION & RECRUITMENT

GOAL: Support the retention and expansion of County businesses and support recruiting efforts for new business through both general and targeted, market based support. Focus on economic development initiatives that: are proactive; are part of a broader economic strategy; diversify the economy; raise the standard of living; create higher-skilled, higher-wage jobs; maximize private investment; maximize return on taxpayer investment; and/or increase the tax base.

Objective Support programs to attract new business and help existing businesses stay in the County while seeking expansion opportunities:

Objective Aid in retaining, expanding and recruiting businesses in primary industries and their supporting industries, particularly those that employ higher-skilled, higher-wage workers.

Objective Aid in retaining, expanding and recruiting small businesses and startups. For example, promote small business access to capital investment and networking opportunities.

Objective Encourage entrepreneurship and innovation:

- Aid in fostering a strong entrepreneurial culture. Recognize entrepreneurs as a vital part of the business community.
- Aid in promoting innovation that creates economic sustainability. Encourage companies to embrace economic evolution by testing new ideas, creating new products, and exploring new markets.

Objective Aid in the promotion of economic diversity. A diversity of skilled laborers, taxing and regulatory structures, housing opportunities, and business locations assures that all business can find a profitable location in which to succeed and improve the County's competitive advantage.

TALENT ENHANCEMENT AND DEMAND DRIVEN OPPORTUNITIES

GOAL: Encourage and support high quality employment services, talent development and demand driven employment opportunities. A sustained quality education system provides training for skilled workers, harnesses talent, promotes civic engagement, and offers rewarding career and lifelong learning opportunities. It is important to identify what the demand for jobs will be in the near future (2-4 years) and train for those jobs as well.

Objective Support the increase in the supply of skilled workers through training programs designed to meet specific employer needs:

- Support or provide venues where industry representatives can convene with workforce training organizations, to link employer needs to targeted skills training.
- Identify primary and emerging industries and their supporting industries. Work to narrow or eliminate skill gaps in these industries.

Objective Support increased access to higher education and talent training:

- Aid in the provision of training for new and displaced workers, and upgrade the skills of incumbent workers in high demand fields. Focus on talent enhancement and training needs that help promote demand-driven employment opportunities.

- Objective** Support the improved efficiency and effectiveness of the current talent development system:
- Aid in the assessment of talent development needs, including employer needs and unique needs of low and moderate income residents. Monitor employment trends using Census data, Bureau of Labor Statistics, etc.
 - Support regional coordination of talent development systems and organizations to reduce unnecessary duplication of effort and bring together partners to craft integrated, comprehensive solutions, without sacrificing flexibility and local area leadership

COOPERATION & COORDINATION

GOAL: Promote a cooperative and coordinated approach to economic development.

Objective Continue to encourage local elected officials to participate in a shared, countywide vision, such as Advantage Livingston. This will significantly enhance a sustained economic development strategy:

- Share County and local economic planning activity throughout the County. Involve local elected officials in the economic planning processes.

Objective Support business via public-private partnerships. Forge strategic partnerships between business, government, education and nonprofit sectors in support of economic development.

- Continue to support the collaborative economic development efforts forged between the Livingston County Economic Development Council (LCEDC) and Ann Arbor SPARK.
- Encourage research and development and technology transfer, through partnerships among schools, the public sector and the private sector.

REGULATIONS & TAXES

GOAL Work to reduce tax and regulatory burdens on County businesses, consistent with maintaining an adequate level of public service and a high quality of life. Taxes and regulations can create disincentives to private investment and can reduce the County's competitiveness.

Objective Encourage the simplification of environmental and development regulations:

- Improve interagency and intergovernmental coordination.
- Promote outcomes that are timely, fairly predictable and consistent, and performance based.
- Support the simplification of local land use and zoning codes. Aid in the development of flexible regulations that balance environmental protection with economic impacts.

Objective Support changes to the state and local tax structures that will improve the business climate:

- Assure tax increases do not fall disproportionately on business; balance household and business tax burdens
- Encourage the use of tax increment financing to support infrastructure improvements
- Consider ways to develop and use tax incentives to retain and expand businesses in the County. For example, tax incentives that encourage business incubation, contribute to public improvements, or support higher wage jobs through on-the-job training.

TRANSPORTATION, UTILITIES & OTHER INFRASTRUCTURE

GOAL: **Support improvements to the County's physical infrastructure that is necessary to attract and sustain economic development.**

Objective Support the efficient transport of materials and commodities:

- Aid in the alignment of road improvements with targeted economic development areas.
- Aid in the improvement of freight mobility and ensure effective access to airport and rail facilities.

Objective Support initiative for the efficient provision of current and future water, sewer, energy, telecommunication and other utility needs:

- Aid in the development of new energy generation and transmission, as appropriate.
- Promote energy efficiency and developing alternative (clean) energy, as a tool for economic development.

- Objective** Secure stable, long-term funding for infrastructure programs, examining ways to expand funding sources and financing options:
- Promote broad-based funding of new infrastructure and projects with a high level of local, state and private matching funds, as well a high return on taxpayer investment. A larger public, private match indicates a higher level of commitment to successful completion by the public sector and higher market-based credibility by the private sector.

LAND USE & DEVELOPMENT

GOAL Promote “smart growth” policies that encourage an economically healthy mix of land uses, housing opportunities and transportation alternatives, natural resource protection, efficient use of land and infrastructure, lower public infrastructure costs, and a high quality of life.

Objective Promote economic development that protects and enhances the County’s natural resources and agricultural strengths.

Objective Encourage mixed-use, pedestrian friendly development, and walkable neighborhoods close to employment centers.

Objective Encourage land uses that support aging in place for the elderly population which are located within the community in order to maximize utility.

Objective Aid in the provision that an adequate supply of land is ready for commercial and industrial development (zoning and infrastructure).

Objective Encourage the alignment of land use planning and development with infrastructure capabilities. Assure that existing infrastructure can serve growth by facilitating infill and compact development

Objective Encourage the expansion of the supply of affordable housing, for example, by increasing densities near employment centers and allowing innovative housing types.

Objective Educate communities and governing bodies about the benefits of sustainable development, resource conservation, and green building practices. Assist in the creation and adoption of plans and activities that promote and use sustainable design and construction practices.

Objective Aid in the creation of quality communities to attract and retain businesses and talented, creative and innovative people:



REGIONAL STRATEGIC PARTNERSHIPS

It is imperative that in order for long-term success, the vision, goals and objectives of the County's economic plan be compatible and harmonious with other local and regional economic plans that have a direct effect on the County. Two such visions/plans for Livingston County are the Advantage Livingston plan

entitled *A Plan for Thriving Together in the New Economy* and the Southeast Michigan Council of Governments (SEMCOG) CEDS plan entitled *Increasing Jobs and Prosperity in Southeast Michigan*.

ADVANTAGE LIVINGSTON

In 2010 the Greater Brighton Area Chamber of Commerce, the Hartland Chamber of Commerce and the Howell Area Chamber of Commerce began a collaboration to develop a strategic growth plan for Livingston County. The process was initiated with a New Economy Economic Summit. At this summit, Michigan's shifting paradigm for success and the New Economic realities at the state and national levels were discussed and examined. Once attendees gained a better understanding of the economic forces that effect local economic development, representatives of the Michigan State University Land Policy Institute outlined a proposed planning process for the Livingston County community. After several community meetings that crossed both organizational and jurisdictional lines, the result was an economic plan for the community at large, entitled: *Advantage Livingston: A Plan For Thriving Together in the New Economy*.

The vision of Advantage Livingston is for the increased and sustainable prosperity of the Livingston County, Michigan, area. To achieve that, the **VISION** of Advantage Livingston espouses the following ideals:

- We will have a collaborative environment across governmental, education, nonprofit and business lines focusing on facilitation and cooperation.
- We will promote, sustain and value our rural and urban settings.
- We will provide a high quality of life for people of all ages and diverse backgrounds.
- We will excel in educational opportunities and performance.
- We will provide an environment that encourages innovation and creation of economic opportunities.
- We will support and invest in all types of mobility, including walking, bicycling, automobile and mass transit.

The Advantage Livingston steering committee met to refine the strategies developed in public workshops that support prosperity and economic development. While the identified assets form this plan's foundation, the **STRATEGIES** are the building blocks that give the plan its form.

These building blocks are the competitive advantages that can be leveraged to attract, retain and grow both the industries and the talent necessary to drive the community's economy forward.



ADVANTAGE LIVINGSTON STRATEGIES

Brainpower — Talent for today and tomorrow

Placemaking — Building connected places to attract talent and growth

Marketing — Promotion, branding

Jobs & Prosperity — Entrepreneurship; business assistance, acceleration and attraction

All intersecting with Collaboration, Cooperation, Consolidation.

Source: Advantage Livingston, 2011

In order for continued success, each one of these strategies have been assigned to an individual committee which oversees and guides the progress of that strategy. These committees meet on a regular basis throughout the year and are comprised of a broad segment of the local community.



SEMCOG COMPREHENSIVE ECONOMIC DEVELOPMENT (CEDS) PLAN

The SEMCOG Comprehensive Economic Development Strategy (CEDS) incorporates the guidelines and strategic priorities set out by the U.S. Economic Development Administration (EDA) and provides a guide for the effective investment in the SEMCOG region's unique resources and assets in order to increase jobs and prosperity and to achieve maximum economic impact and competitiveness on a global scale.

The eleven SEMCOG economic strategies build upon existing programs, brings stakeholders together, and explores opportunities across three themes: People (Talent), the Business Climate and Community Assets. The eleven strategies consist of the following:

Educating our Future Workforce

A regional strategy for developing an educated workforce that can compete in the global marketplace must emphasize quality K-12 and higher education curriculum tied to workforce skills and economic needs. This workforce must have the ability to adapt quickly to dynamic changes in the workplace.

Retooling our Workforce

This strategy links workforce development with economic development through hastened efforts to retrain and upgrade skills of incumbent displaced workers. They need to be prepared for new employment opportunities as a result of the new economy. The strategy addresses the need to get them back into the workforce; and increase the region's ability to attract, retain, and grow new businesses requiring these skills. Important considerations of this strategy are identifying occupations that are compatible with Southeast Michigan skill sets, as well as emerging workforce trends, and funding of retraining programs.

Advancing innovation and Technology

This strategy requires strengthening support and collaboration between business, education, economic developers, and researchers. These efforts develop new products that range from cutting edge inventions to more efficient ways of doing things, and help the region to compete in a knowledge economy. Innovative, technology-driven ideas must be brought to market quickly, and mechanisms that encourage innovation must be enhanced. Advanced manufacturing, alternative energy, innovations in health care and bio-medicine, defense, and other emerging industries complement the region's capabilities of moving ideas from design, to production, to market. The region must continually drive initiatives that help bridge the gap between ideas and business applications.

Creating an Entrepreneurial Culture

This strategy highlights that creating an entrepreneurial culture is a key element to Southeast Michigan's economic transformation and return to prosperity. The strategy requires developing entrepreneurial qualities through the region's educational system, as well as attracting and nurturing people with this mindset, which combines drive, creativity, and calculated risk-taking with unique business skills. Resources, support services, and financing are needed to promote business activity among start-ups and Stage Two companies to drive job growth and help diversify the economy.

Increasing Capital Funding

Increasing Capital Funding is critical to advancing our regional economy. Insufficient available capital hurts existing industry operations and expansions and limits entrepreneurial start-ups. Access to capital must be increased by making it easier to locate and tap existing funding. The region must also work to expand lending sources such as traditional banks and financial institutions, as well as venture capital, angel investors, and seed funds. Additionally, public and private partners within the region must advocate at both federal and state levels to address ongoing business financing concerns and the regulatory environment.

Designing a Fair and Competitive Tax Structure

A fair and competitive tax structure is paramount to the needs of both business and government. The strategy states that our region's tax structure needs to be predictable and appealing to businesses' market-based location, expansion, and operating decisions, while appropriately sustaining critical government services.

Shaping Responsive Government

This strategy highlights the ideal that shaping responsive government requires movement from a regulatory mindset toward a customer service orientation, while maintaining the safety, health, welfare, and values of the community and its citizens. This business friendly

approach includes certainty, consistency, and promptness in the regulatory process; ensuring policy/regulations match intent; and streamlining operations and prioritizing services in light of limited revenues.

Enhancing Transportation Connections

This strategy calls for the maintainance, support, and enhancement of the region's transportation infrastructure that provides efficient and safe movement of freight and people throughout the region and connects our region to markets around the globe. An effective transportation system is vital to economic development, business attraction and expansion, trade, tourism, and quality of life. As a region, investment in transportation must be accomplished and the region must continue to pursue policies and initiatives that maximize use of federal transportation funding and the integrity of the transportation infrastructure.

Optimizing Infrastructure Investment

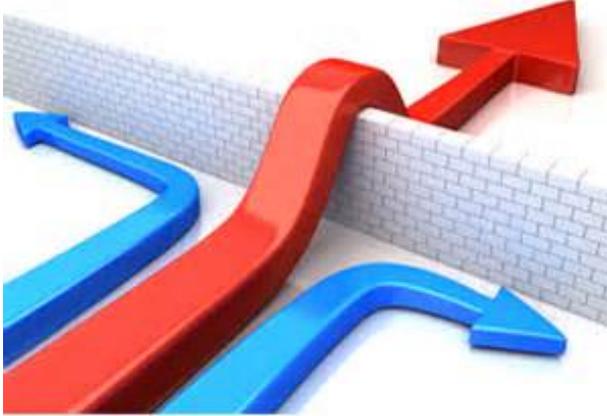
This strategy promotes the ideal that optimizing infrastructure investment is vital to Southeast Michigan's economic future. The current fiscal environment presents unprecedented challenges in maintaining aging roads, bridges, sewer and water, energy and telecommunications, as part of a quality infrastructure system. The region must transform it's infrastructure management approach in a way that supports and enables this economic strategy, promotes collaboration among service providers, educates the public, leverages the region's assets, and prioritizes needs, while recognizing the limited financial resources of the region.

Marketing the Region

This strategy states that marketing the region requires a unified approach to communicating its many assets and presenting a positive, united front to those businesses and knowledge workers the region seeks to attract. These efforts should enhance the region's image and relationships with both internal and external audiences and help it move beyond stereotypes and perceptions. The region needs to create an energy and appeal that grows jobs, broadens perspectives, and increases opportunity. Resources need to be directed to assist economic development organizations and their partners in these collaborative efforts.

Strengthening Quality of Place

This strategy states that strengthening quality of place enhances and promotes the region's amenities and resources that attract business and talent, both of which are vital to the growth of the region's economy. Marketing assets (e.g., cultural, recreational, and social opportunities; diverse population) and improving key factors (e.g., central cities, sustainable development, transit) will better position the region as a desirable place to live and work, and make it easier to attract and retain new economy industries and a highly skilled, knowledge-based workforc



COUNTY STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

A basic part of the strategic planning process is an assessment of the County's strengths and weaknesses, as they relate to economic growth. It is important to note that economic development is not just about job growth. In fact, economic development can be defined as the creation of wealth and the rise of the local standard of living. In general, it involves:

- Creating higher wage jobs that, in turn, increase income levels.
- Providing the local work force with the skills necessary to successfully perform these jobs.
- Investing in appropriate infrastructure and other business support networks, such as education and health care.
- Removing impediments to business and providing incentives.
- Providing an overall high quality of life.

SWOT ANALYSIS – COMMUNITY STRENGTHS, WEAKNESSES, OPPORTUNITIES and THREATS

In order to better gauge the direction our community must go to achieve success and sustainability in the future and to gain a more direct perspective of the goals and objectives for the CEDS Plan, a simple SWOT analysis is necessary. A SWOT analysis stands for Strengths, Weaknesses, Opportunities, and Threats. A SWOT analysis is a useful tool to identify the positives and negatives inside community and outside of it. Developing a full awareness of your current situation can help with both strategic planning and decision-making.

Insofar as they are appointed to serve and represent the different sectors as well as geographic locations of the County, the Livingston County Planning Commission undertook a SWOT analysis exercise by addressing questions related to each SWOT category. The following is the results of this exercise.

COMMUNITY STRENGTHS

For this SWOT category, Planning Commissioners were asked to answer the following questions:

- **What Livingston County Does Well ?**
- **Our Advantages Over Our Neighbors ?**
- **Our Assets ?**
- **Our Resources ?**

Responses:

In visiting the Livingston County townships in 2010, the Planning Department was in each to familiarize the townships on the services offered by the Planning Department and also to ask what each township had needs for, what projects they were working on. A list was made, reviewed and commented on. That is progress – information and movement into the future planning – Working Together.

Recreation areas are being accomplished more often (Parks).

Grant writing is more often used to acquire the elusive monies available for projects, etc.

The community does a good job of bringing people together within the County for special events, like Balloonfest and the Light Parade.

The County has good North/South and East/West highway access.

The County has an airport capable of bringing in cargo and general aviation aircraft.

As compared to neighboring counties, Livingston County has room to develop its highway and business districts/corridors.

Livingston County LETS buses provide inexpensive transportation for seniors.

Livingston County government balances it's budget.

Cities, Villages and Townships within the County get along with each other, cooperation.

The County has good schools and abundant recreational opportunities, such as lakes, green areas.

Livingston County has strong community collaboration. Intergovernmental and community relationships are always a challenge and something that must be continuously developed, however, the Advantage Livingston effort has really shown that community leaders have an interest in working together.

Livingston County has a small community life that is not congested like Lansing, Flint, Ann Arbor and Detroit.

Livingston County has approachable local governments.

The natural environment of Livingston County is probably the biggest asset that we have. As a former cottage community for Metro Detroit residents, the County was attractive due to the large number of lakes and other natural features.

The County has a multitude of beneficial resources. The Interstate 96 and U.S. 23 transportation corridors for commuting ease, the amount of land available for development, lack of congestion, Metroparks, State parks, good schools, an abundance of new housing stock, and two traditional downtowns that draw residents to small community life.

COMMUNITY WEAKNESSES

For this SWOT category, Planning Commissioners were asked to answer the following questions:

- **What Livingston County Could Do Better?**
- **What are the community's vulnerabilities ?**

Responses:

Planning for the senior population is still very poor.

There are many needs that seniors have and need help with. The County needs more coordination with all services to make sure we are covering those.

The County could do a better job of attracting business and industry that is not auto-dependent. I would like to see some kind of niche-business develop in Livingston County. I was really intrigued to hear that Regal Recycling on Lucy Road might develop a state-of-the-art battery recycling facility.

The County is vulnerable as a community that might not be appealing to anyone who does not want the commuting lifestyle, since approximately 60 percent of workers commute to jobs outside the county. Also, as such as has been done to fight and overcome the old reputation of racism in this community, I know people that have moved away to be located in a more culturally diverse community (neighbors and family).

Road maintenance could be much better.

Increased crime from surrounding counties pose a threat to our community.

We seem to struggle with development vs. losing our rural charm. The problem is the the up and coming generations want to live where they work. No more long commutes!

We need to work on business districts with a mix of commercial and living.

COMMUNITY OPPORTUNITIES

For this SWOT category, Planning Commissioners were asked to answer the following questions:

- **Growing Trends? (Local / Regional / National)**
- **Untapped New Products?**
- **Untapped New Technologies?**
- **Untapped Workforce Niches?**
- **Untapped Educational Niches?**

Responses:

Senior living and care facilities seem to be a good fit for our area. Promote and grow our medical center.

Shared services between local governments, i.e., what the City of Howell and County Facility Services department are doing.

The possibilities of a county-wide school board instead of local towns to cut costs. Could this be done on some level?

The increase in our region's senior population is a growing trend, as well as the willingness to develop and support more mass transportation opportunities in SE Michigan.

The county is more of a "blank slate" for potential land development of senior living environments and entertainment. Some resources are already here, such as recreational opportunities. There has been an increase recently in new senior living developments, however, growth in this sector is still an untapped opportunity.

There is untapped agricultural history and expertise in the county and agribusiness technologies could really take hold in this community.

We are a prime location for a satellite or branch campus of a major university, particularly because the county is located halfway between Michigan State University and the University of Michigan. The new I-96 interchange at Latson Road in Genoa Township could be a prime location for a new educational opportunity.

COMMUNITY THREATS

For this SWOT category, Planning Commissioners were asked to answer the following questions:

- **Community Weaknesses?**
- **External Roadblocks?**
- **Marketplace Changes?**
- **Changing Economic Conditions?**

Responses:

Because of the changes in budget, etc., in the past several years, the County Planning Department no longer can cover and put out planning assistance guidebooks to local communities and the public at large, as they once did. These were of tremendous benefit to our still growing community. It's hoped that with the economic recovery, Planning Department staff can be increased to cover the necessary topics, booklets, etc. to help effective planning in the townships.

Better cooperation at the township and city level. Fighting within the County governments will take energy away from the benefit of the county as a whole.

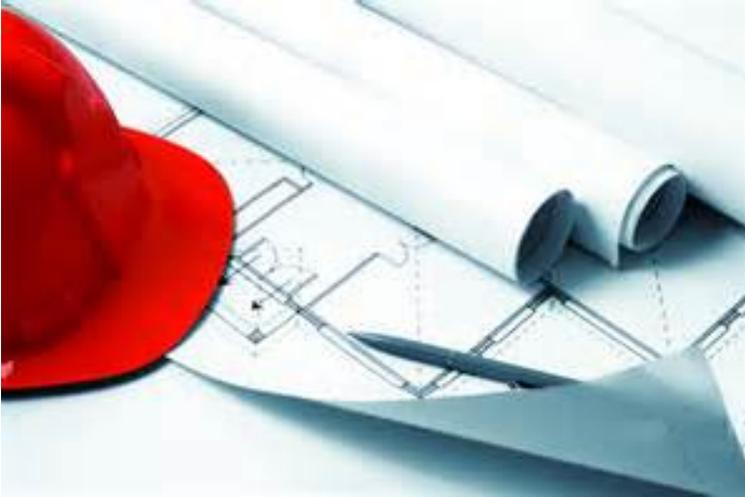
The abundance of empty buildings in neighboring communities.

Poor cellular coverage on multiple networks.

There is a reluctance to try new land use and economic development techniques.

Funding for projects is a threat to our community. The relative high median income level in the county makes our community ineligible for many State/Federal funding opportunities. Therefore we have unfunded projects or the public must bear the cost through millages, etc. The dramatic increase in senior population can also be seen as a threat because if we don't address this change then we will experience an out migration of senior-aged persons who cannot "age in place" within Livingston County.

If Livingston County experiences another population surge, we may encounter a renewed threat of sprawl, blurring the demarcation between our communities. If we don't find good methods of counteracting this, our community will look much like those of surrounding counties.



CEDS PROJECT LIST

The following is a brief description of the projects that are included in the 2014-2018 CEDS.

PROJECT LIST

Project/Initiative: Livingston County Spencer J. Hardy Airport

- *Lead organization:* Livingston County
- *Description:* This project represents a five-year plan for airport improvements. Most improvements are subject to the availability of federal and state grant funding and include, but are not limited to, maintenance buildings, a corporate hanger, 40-T hanger units, and purchase of snow equipment.
- *Geography/location:* Howell Township, Livingston County (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$685,000

Project/Initiative: I-96/US-23 Interchange

- *Lead organization:* MDOT, City of Brighton
 - *Description:* The Michigan Department of Transportation (MDOT) will make major safety and operational improvements to the I-96/US-23 interchange in Brighton Township, Livingston County. The project includes:
 - Constructing new through-lanes on I-96 between the current eastbound and westbound lanes;
 - Building three new bridges over northbound and southbound US-23, and over Old US-23;
 - Changing the existing lanes of I-96 to collector-distributor (CD) lanes for easier and safer lane changes for ramp traffic; and
 - Rebuilding the existing six bridges over US-23 and Old US-23.
- *Geography/location:* City of Brighton and Brighton Township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$32 million

Project/Initiative: County Park Improvements

- *Lead organization:* Livingston County
- *Description:* Development and improvements to Lutz and Fillmore County Parks.
- *Geography/location:* Livingston County (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* Undetermined at this time.

Project/Initiative: County Road and Bridge Improvements

- *Lead organization:* Livingston County Road Commission
- *Description:* Various improvements to county roads and bridges.
- *Geography/location:* Livingston County (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$6,192,200.

Project/Initiative: Township Water System

- *Lead organization:* Hartland Township
- *Description:* Construction of the township water system.
- *Geography/location:* Hartland Township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$712,500

Project/Initiative: Livingston/Genesee Wastewater System

- *Lead organization:* Livingston County Board of Public Works
- *Description:* Construction of the Livingston / Genesee wastewater system.
- *Geography/location:* NE quadrant of County (Hartland and Tyrone Townships) (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$2,289,950

Project/Initiative: Nazerene Camp, Lake Tyrone Sanitary Sewer Improvements

- *Lead organization:* Livingston County Board of Public Works
- *Description:* Connection to Livingston Regional Sewer, abandonment of existing wastewater system, collection system upgrades.
- *Geography/location:* Lake Tyrone (Hartland and Tyrone Townships) (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$3,858,250

Project/Initiative: County Drain maintenance

- *Lead organization:* Livingston County Drain Commissioner
- *Description:* Various drain upgrades and maintenance projects throughout the county.
- *Geography/location:* Various drain locations throughout the county (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$1,645,850

Project/Initiative: Township Sanitary Sewer and Water Systems

- *Lead organization:* Brighton Charter Township, Livingston County Drain Commissioner
- *Description:* Various sewer and water upgrades and maintenance projects throughout the township.
- *Geography/location:* Various sewer and water locations throughout the township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$500,000

Project/Initiative: Various City Infrastructure Projects

- *Lead organization:* City of Brighton
- *Description:* Various street, sewer and water upgrades and maintenance projects throughout the city.
- *Geography/location:* City of Brighton (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$9,690,500

Project/Initiative: Various City Infrastructure Projects

- *Lead organization:* City of Brighton
- *Description:* Various street, sewer and water upgrades and maintenance projects throughout the city.
- *Geography/location:* City of Brighton (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$9,000,000

Project/Initiative: Road Improvement Projects

- *Lead organization:* Green Oak Charter Township, Livingston County Road Commission
- *Description:* Various street and road upgrades and maintenance projects throughout the township. This is the township's 15-year road improvement plan funded through millage of approximately \$1 million annually.
- *Geography/location:* Green Oak Charter Township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$16,000,000

Project/Initiative: Non-motorized Path Portion of Paved Township Roads

- *Lead organization:* Green Oak Charter Township, Livingston County Road Commission
- *Description:* Provide non-motorized access along all paved township roads. This is the township's 15-year road improvement plan funded through millage of approximately \$1 million annually.
- *Geography/location:* Green Oak Charter Township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$1,350,000

Project/Initiative: Township Roads

- *Lead organization:* Handy Township, Livingston County Road Commission
- *Description:* Upgrade Nicholson Road.
- *Geography/location:* Handy Township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$90,000

Project/Initiative: Township Sewer

- *Lead organization:* Handy Township, Livingston County Drain Commission
- *Description:* Complete Grand River sewer line west of Nicholson Road.
- *Geography/location:* Handy Township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$400,000

Project/Initiative: Township Roads

- *Lead organization:* Tyrone Township, Livingston County Road Commission
- *Description:* Upgrade various roads within the township.
- *Geography/location:* Tyrone Township (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$100,000

Project/Initiative: City Roads and Streets Projects

- *Lead organization:* City of Howell
- *Description:* Upgrade various roads and streets within the city.
- *Geography/location:* City of Howell (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$5,100,000

Project/Initiative: City Water and Sewer Projects

- *Lead organization:* City of Howell
- *Description:* Upgrade various sewer and water infrastructure within the city.
- *Geography/location:* City of Howell (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$5,250,000

Project/Initiative: City Water and Sewer Projects

- *Lead organization:* City of Howell
- *Description:* Upgrade various sewer and water infrastructure within the city.
- *Geography/location:* City of Howell (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$5,250,000

Project/Initiative: Wastewater Treatment Plant Projects

- *Lead organization:* Village of Pinckney
- *Description:* Construct third lagoon and sand beds, add collection systems.
- *Geography/location:* Village of Pinckney wastewater treatment plant (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$3,150,000

Project/Initiative: Township Road Improvement Projects

- *Lead organization:* Village of Pinckney
- *Description:* Upgrade Unadilla, Mill and Marion Streets.
- *Geography/location:* Village of Pinckney (refer also to 2013 Livingston County CIP Plan/Inventory).
- *Estimated investment requirements:* \$2,614,000



CEDS PERFORMANCE MEASURES

Progress through the CEDS period can be measured through utilization of a variety of statistical indicators for the county.

As part of efforts to continually monitor and evaluate the effectiveness of this regional economic development strategy, two (2) types of performance measures will be tracked on an annual basis:

- Regional economic conditions
- Programmatic measures

The following performance measures will be monitored under **Regional Economic Conditions**:

- A. The **number of new jobs created** in Livingston County. Data from the Livingston County Michigan Works! Agency will be used to track this performance measure.
- B. The **Unemployment rate** in Livingston County as compared to the State of Michigan and U.S. Data from Bureau of Labor Statistics (BLS) will be used to track this performance measure.
- C. The **Per Capita Income and Median Household Income** for each county as well as local communities with Livingston County as reported by the most recent U.S. Census or America Community Survey (ACS) data.

The following performance measures will be monitored under **Programmatic Measures**:

- A. The **amount of Small Business Loans approved**, including the amount of private funding leveraged and number of jobs created.
- B. The **amount of Public Infrastructure and Community Development projects funded**, including the amount of other funds leveraged.
- C. The **amount of Technical Assistance and Planning Projects funded**, including the amount of other funds leveraged.

Data for these performance measures will be obtained through the Livingston County Michigan Works! agency among others.