



Indicator
Report

2016

RVA SNAPSHOT

A shared vision for our region.



INTRODUCTION

Transforming Our Story

BILL MARTIN
DIRECTOR OF THE VALENTINE



Richmond's story is America's story. Our questions are also the ones that our nation continues to ask. As a region, we continue our tradition of rediscovering our past and by working together, we have the ability to invent our future.

We are a region of innovation and enterprise. Look no further than in the early coalfields and rail lines, to Jackson Ward's Second Street, to the processing of tobacco and other agricultural products, to new ideas in finance (the bank issued credit card!), retail, advertising, and insurance.

We are a region of trade and transportation. It certainly begins at the falls of the James, the port of Richmond and the canals that extended into the region. But it continues with the development of the first electric trolleys, the growth of the interstate highway system and the introduction of public transportation.

We are a region of families and community. We are defined by our neighborhoods and their continuing evolution. It is historic townhouses, apartments, single residences, and family farms. It is founding families to new arrivals.

We are a region of learning and discovery. From the creation of the Commonwealth's first medical school to research centers and universities across the region, from the first aluminum beer

can to heart transplants, the educational institutions of the region play a critical role.

We are a region of faith and freedom. From Patrick Henry's cry for "liberty or death" to Gabriel Prosser's rebellion, from Thomas Jefferson's Statute of Religious Freedom to the challenges of John Mitchell's newspaper the Richmond Planet, new voices continue to be heard.

As a region steeped in history, we must come together to shape our future. What can we continue to learn from each other, in partnership and action? The Capital Region Collaborative brings our community together around a shared vision. But it is up to every person across the region to transform this vision into our reality.

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INDICATORS PROJECT

What is the Capital Region Collaborative?

We bring together government, business, and community partners to achieve a shared vision for the Richmond Region. The number and complexity of challenges we're facing can be overwhelming. These issues go beyond our individual communities, and no one person or group can tackle them alone. The CRC creates a culture of collaboration around these shared challenges and opportunities. We're thinking creatively about how to mobilize networks, ideas, approaches, and resources to unlock the full potential of the Richmond Region.

Our Story

The Capital Region Collaborative started its work in 2007. We asked over 8,000 community members to share their thoughts on the challenges and aspirations for our region. What did we learn? Across our region, we depend on our health, a quality place to live, a stable job market, a talented workforce, a coordinated transportation system, and equal access to a wealth of cultural, recreational and educational opportunities. In 2012, we captured this feedback and turned it into a list of

eight priority areas that will help make our region a better place to live for years to come. The priority areas are meant to strategically guide how we collectively spend our time, energy, and resources for the greatest impact.

The Snapshot Report

This report highlights baseline indicators in each priority area that will help us capture the current state of our region, compare ourselves to similar communities, and measure progress over time. In some cases, you will notice that we've included indicators that may not have comparable data to other regions. Over the past year, we've worked closely with subject matter and data experts to choose some of the most meaningful measures to best understand our region.

We've also included articles from local leaders that draw attention to particular topics within each priority area. And lastly, "Collaboration at Work" articles highlight collaborative efforts which are advancing priority area goals. Some are closely aligned with the work of the Capital Region Collaborative, others are not. But all of them show the tremendous impact of working together.

Defining the Region

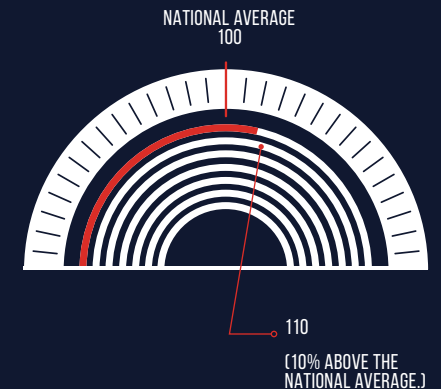
Data for the Richmond Metropolitan Statistical Area (MSA) is used to compare the Richmond Region to our peer regions. The MSA includes: the cities of Richmond, Hopewell, Petersburg, and Colonial Heights; the counties of Amelia, Caroline, Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, King William, New Kent, Powhatan, Prince George, Sussex; and the towns of Ashland and Bowling Green. For indicators specific to our region, we've defined the region as the 9 jurisdictions of the CRC: the City of Richmond, the Town of Ashland, and the Counties of Charles City, Chesterfield, Goochland, Hanover, Henrico, Powhatan, and New Kent.

Comparative Regions

Peer regions were chosen for their comparable size and composition. These same regions have been used in several studies by Richmond's Future, Virginia Commonwealth University, and for the Richmond Region Comprehensive Economic Development Strategy.

How to Read the Data

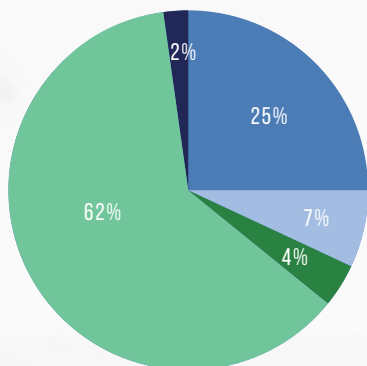
This report utilizes primary data sources (ie: Census, Bureau of Labor Statistics, etc), jurisdictional data, and secondary data sources (ie: JobsEQ®, Chmura, etc.) to paint a complete picture of the region. We used the most up-to-date and reliable data available. In order to group the indicators into one comparable value, we've chosen to index them by priority areas relative to the United States average. For example, a value of 110 means the region is performing 10% above the national average.



NOTE: It's important to understand that the dashboard image is meant to serve as a big-picture, comparative overview of our region. To truly understand our strengths and challenges, as well as our opportunities for impact, we must look at the individual statistics.

LAND USE

Looking at how the region's land is committed to use over time helps us better understand growth patterns and make informed land use decisions.



- COMMERCIAL
- RESIDENTIAL
- IN TRANSITION
- PARKS / OPEN SPACE
- AGRICULTURE / FOREST

Source: Compiled by the Richmond Regional Planning District Commission 2015.

SOURCES & EXPLANATIONS

Source: U.S. Census, 2014 1-Year Estimate American Community Survey.

POPULATION

Total population by peer region.

AUSTIN	1,943,299
HARTFORD	1,214,295
JACKSONVILLE	1,419,127
LOUISVILLE	1,265,210
MEMPHIS	1,344,121
RALEIGH	1,242,974
RICHMOND	1,260,668

AGE

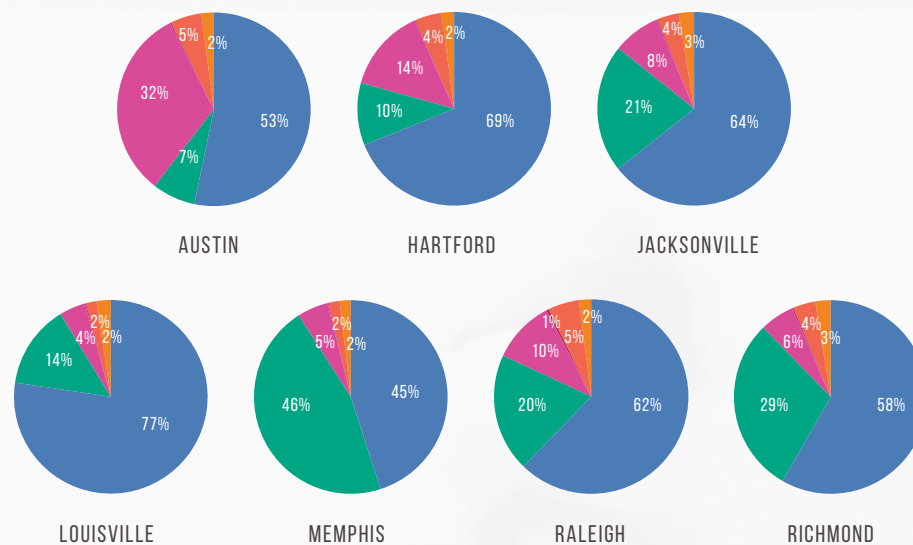
Total population broken up by age group and with the region's median age.

	% <18	% 18–24	% 25–34	% 35–49	% 50–64	% > 64	Median Age
AUSTIN	24%	10%	17%	22%	17%	9%	33.9
HARTFORD	21%	10%	12%	19%	21%	16%	40.5
JACKSONVILLE	23%	9%	14%	19%	20%	14%	38.1
LOUISVILLE	23%	9%	13%	20%	21%	14%	38.4
MEMPHIS	26%	10%	14%	19%	19%	12%	35.7
RALEIGH	25%	9%	14%	23%	18%	11%	36.1
RICHMOND	22%	10%	14%	20%	20%	14%	37.9

RACE AND ETHNICITY

Total population broken up by race and ethnicity.

- WHITE
- HISPANIC
- ASIAN
- BLACK
- AMERICAN INDIAN
- OTHER



Other includes Native Hawaiian and other Pacific Islander, some other race, and two or more races.

EDUCATION

ASPIRATION

The region ensures that every child graduates from high school college or career ready.

CURRENT RANK **4th**

INDICATORS DASHBOARD



DASHBOARD BREAKDOWN

HARTFORD	124.39
RALEIGH	120.46
AUSTIN	111.13
RICHMOND	103.75
NATIONAL AVERAGE	100.00
JACKSONVILLE	97.62
LOUISVILLE	93.79
MEMPHIS	90.75

PRESCHOOL ENROLLMENT

% 3 to 4 year olds enrolled in public or private pre-school.

HARTFORD	67.0%	RICHMOND	45.3%
RALEIGH	53.1%	LOUISVILLE	40.8%
JACKSONVILLE	48.5%	MEMPHIS	40.1%
AUSTIN	46.9%		

Source: U.S. Census, 2014 1-Year Estimate American Community Survey.

POPULATION WITH A HIGH SCHOOL DIPLOMA

% of the population 25-64 years with a high school diploma.

HARTFORD	90.4%	RICHMOND	88.4%
JACKSONVILLE	89.9%	AUSTIN	87.2%
RALEIGH	89.7%	MEMPHIS	86.8%
LOUISVILLE	88.5%		

Source: U.S. Census, 2014 1-Year Estimate American Community Survey.

POPULATION WITH A BACHELOR'S DEGREE

% of the population 25-64 years with a bachelor's degree.

RALEIGH	45.8%	LOUISVILLE	29.2%
AUSTIN	42.0%	MEMPHIS	27.5%
HARTFORD	40.0%	JACKSONVILLE	27.3%
RICHMOND	35.7%		

Source: U.S. Census, 2014 1-Year Estimate American Community Survey.

The Dashboard values are indexed using the indicators above.

Why is this important?

Education is key to economic growth. People with limited skills and competencies are often excluded from higher wage jobs and have fewer prospects for advancement. Additionally, research shows that success in school is tied to higher quality of life measures, such as health and civic engagement. The level of educational attainment of a region's population is an important measure of its potential for achievement and competitive advantage in a global environment.

Key Takeaways and Opportunities for Action

What are Hartford and Raleigh doing to ensure that children are enrolled in quality preschool programs? How can we build success along the educational pipeline? Baseline indicators show that progress is being made once students enter school with advancements in reading and eventually graduation. Learn more about the importance of high school graduation in the workforce preparation section.

DID YOU KNOW?

1,312 high school students in our region did not graduate on time in 2015.¹

COLLABORATION AT WORK

SMART BEGINNINGS

RICH SCHULTZ
EXECUTIVE DIRECTOR OF SMART BEGINNINGS GREATER RICHMOND



Smart Beginnings Greater Richmond, which launched in 2007, exemplifies what can be achieved

when communities work together. The initiative convenes more than 180 organizations to develop innovative solutions that address systemic issues facing our future workforce.

Staggering regional statistics are compelling leaders to act:

- » 20% of children 0-5 live in poverty—that's 16,035 children.
- » 1 of every 8 children in our region enters school without the necessary skills to be successful.
- » 869 students attending 3rd grade in 2013-2014 were held back before that year, which cost taxpayers \$9.4 million.

These statistics deeply affect individual children and families, as well as the economic vitality of the region. Smart Beginnings

tackles these issues from a coordinated, regional approach so that more children enter school ready to succeed.

Regional Collaboration: Starting in 2011, Smart Beginnings and local school systems implemented a public awareness campaign promoting a single date for kindergarten registration. This initiative will continue in 2016 and has grown to include 15 school divisions. Surveys from 2015 report that 93% of parents were better prepared to register because of the campaign.

Driving Efficiency: Smart Beginnings helped establish the Home Visiting Referral Center with the City of Richmond and United Way of Greater Richmond & Petersburg in 2008 to streamline referrals to home visiting programs so that more at-risk families could access services. The effort continued to evolve, and participating programs have benefited from more than \$1M in state grants since 2013 to expand services in challenged neighborhoods.

Why Reading Proficiently by Third Grade is so Important

REBEKAH HOLBROOK

Director of Community Impact: Education at United Way of Greater Richmond & Petersburg



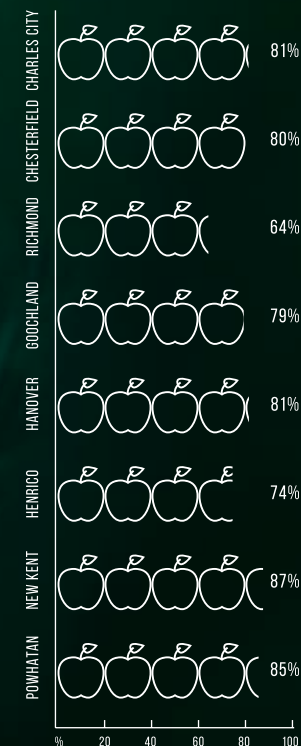
The transition from “learning-to-read” to “reading-to-learn” is a critical milestone for children. Students who do not read at grade level by the end of 3rd grade are 4 times more likely to drop out of school than those who are proficient readers. And for children who live in poverty, even for just one year, 26% are likely to not graduate from high school.* This is 6 times the rate for all proficient readers.

In the Richmond Region, 79% of 3rd grade students passed the reading SOL in 2014. The achievement gap between low-income kids and their more affluent peers is more pronounced. For localities with greater poverty, the passage rate was much lower. All of our school systems are working on intervention programs to achieve greater 3rd grade reading proficiency. To effectively move forward, the region needs to invest in gathering and analyzing data for quality improvement and greater alignment of public and private dollars and turn attention to the positive transition between school and college/career. Coordination of a region-wide Grade Level Reading Campaign, consistent execution of summer learning loss programs, and adoption of trauma-informed and whole-family approaches are several additional measures to consider. Broader public support and sharing of best practices across school systems is essential as our schools strive to provide excellent educational experiences for our children.

*Early Warning! Why Reading By the End of Third Grade Matters. Annie E. Casey Foundation, 2010. <http://www.aecf.org/resources/early-warning-why-reading-by-the-end-of-third-grade-matters/>

3RD GRADE READING SOL SCORES

Passage rates by School Division.



Source: Virginia Department of Education, 2014-2015 academic year

SOURCES & EXPLANATIONS

1. Class of 2014 On-Time Graduation Rates | Source: Virginia Department of Education, Virginia Cohort Reports, Class of 2014.

The dropout rates for Charles City and Goochland were not included because these two groups were too small to be reported.

JOB CREATION

ASPIRATION

The region enjoys a diverse economy that is competitive in the global marketplace and provides job opportunities for all.

CURRENT RANK

6th

INDICATORS DASHBOARD



DASHBOARD BREAKDOWN

AUSTIN	120.78
RALEIGH	107.43
HARTFORD	105.97
NATIONAL AVERAGE	100.00
LOUISVILLE	94.95
JACKSONVILLE	89.49
RICHMOND	85.01
MEMPHIS	74.66

ANNUAL WAGES

Average Annual Wages (adjusted for the cost of living).

MEMPHIS	\$57,237	LOUISVILLE	\$51,144
AUSTIN	\$51,948	RALEIGH	\$49,081
HARTFORD	\$51,905	JACKSONVILLE	\$49,013
RICHMOND	\$51,229		

Source: JobsEQ, Chmura Economics and Analytics, 3rd quarter 2015. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

UNEMPLOYMENT RATES

% of the labor force 16 years and older that is not employed but actively seeking employment.

AUSTIN	3.4%	JACKSONVILLE	5.6%
RALEIGH	4.5%	HARTFORD	6.0%
LOUISVILLE	4.7%	MEMPHIS	6.7%
RICHMOND	5.1%		

Source: JobsEQ 2015, Chmura Economics and Analytics, March 2015, seasonally adjusted. U.S. Bureau of Labor Statistics.

EMPLOYMENT GROWTH

Year over year employment percentage change.

RALEIGH	4.3%	RICHMOND	1.9%
AUSTIN	4.2%	MEMPHIS	1.5%
LOUISVILLE	3.0%	HARTFORD	1.1%
JACKSONVILLE	2.9%		

Source: JobsEQ, Chmura Economic and Analytics, 1st quarter 2015. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

NUMBER OF MAJOR COMPANIES

Companies with 500+ employees.

HARTFORD	150	JACKSONVILLE	105
RICHMOND	148	MEMPHIS	100
AUSTIN	125	RALEIGH	98
LOUISVILLE	108		

Source: YourEconomy.org, a product of the Edward Lowe Foundation, 2013.

The Dashboard values are indexed using the indicators above.

Why is this important?

The number of new jobs created through expansion of existing industries and the attraction of new employers is a key determinant of a region's economic sustainability. Diversification of employment allows a regional economy to weather larger economic trends reflected in unemployment and wage rates.

Key Takeaways and Opportunities for Action

Traditionally, 60% of job growth comes from existing businesses and industries. In the Richmond Region, 75% of new job growth in 2015 came from existing employers. While we must continue to attract new companies to our region, it's also essential to support and retain our existing businesses. We find strength in the number and diversity of our large employers, but more than half of employment is provided by employers with less than 100 employees.

DID YOU KNOW?

We have 10 Fortune 1000 companies headquartered in our region.¹

COLLABORATION AT WORK

CWI WELDING PROGRAM

ANDREW WALKER
LEAD WELDING INSTRUCTOR
FOR THE CWI WELDING PROGRAM



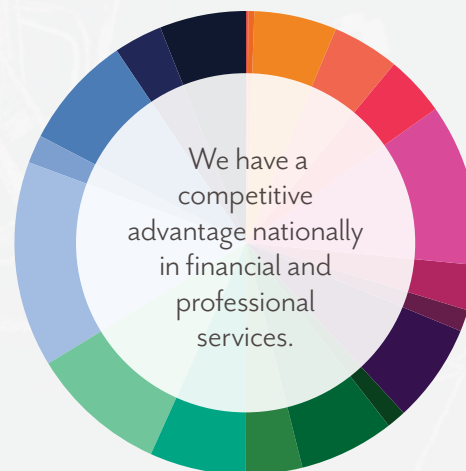
The Center for Workforce Innovation (CWI) Welding Program is a collaboration between the CWI, the City of Richmond's Office of Community Wealth Building, and Strickland Machine. The program, as part of Mayor Dwight C. Jones' initiative to fight poverty, helps individuals in poverty learn employable skills that can

lead to financial independence. Jobs that offer living wages are a key strategy to mitigate poverty. Welding is one occupation that can offer a variety of career opportunities locally and abroad. Welding jobs may offer a livable wage regardless of background and challenges. The CWI Welding Program was originally designed to train and prepare 20 participants for certification. Over the past two years the program has met that goal, with more than 90% of participants passing certification testing and 30% of participants using their skills in the field. In addition to skills training in welding, participants receive forklift and Occupational Safety and Health Administration (OSHA) training.

Over the past two years, participants have had the opportunity to work on several special projects. The UCI World Championships race, for example, provided the unique opportunity for participants to build bike racks and finish line barriers (in collaboration with the Greater Richmond Chamber) throughout the city, as well as art stands for the Virginia Museum of Fine Arts (VMFA). In the future, the program is expanding to include auto body repairs in addition to welding.

EMPLOYMENT DIVERSITY

Employment by industry across
the Richmond Region.



Source: JobsEQ, Chmura Economic and Analytics, 1st quarter 2015. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages. Includes all jobs located in the Richmond Regional Planning District Commission footprint.

AGRICULTURE, FORESTRY, FISHING AND HUNTING	0.10%
MINING, QUARRYING, AND OIL AND GAS EXTRACTION	0.06%
UTILITIES	0.40%
CONSTRUCTION	5.76%
MANUFACTURING	4.68%
WHOLESALE TRADE	4.21%
RETAIL TRADE	11.33%
TRANSPORTATION AND WAREHOUSING	3.17%
INFORMATION	1.50%
FINANCE AND INSURANCE	6.90%
REAL ESTATE AND RENTAL AND LEASING	1.35%
PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES	6.64%
MANAGEMENT OF COMPANIES AND ENTERPRISES	3.93%
WASTE MANAGEMENT AND REMEDIATION SERVICES	6.71%
EDUCATIONAL SERVICES	9.54%
HEALTH CARE AND SOCIAL ASSISTANCE	14.36%
ARTS, ENTERTAINMENT, AND RECREATION	1.97%
ACCOMMODATION AND FOOD SERVICES	7.95%
OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION)	3.39%
PUBLIC ADMINISTRATION	6.05%

SOURCES & EXPLANATIONS

1. Source: <http://www.fortune.com>, June 2015. Fortune 1000 highlights the 1000 largest American companies, ranked by revenues.

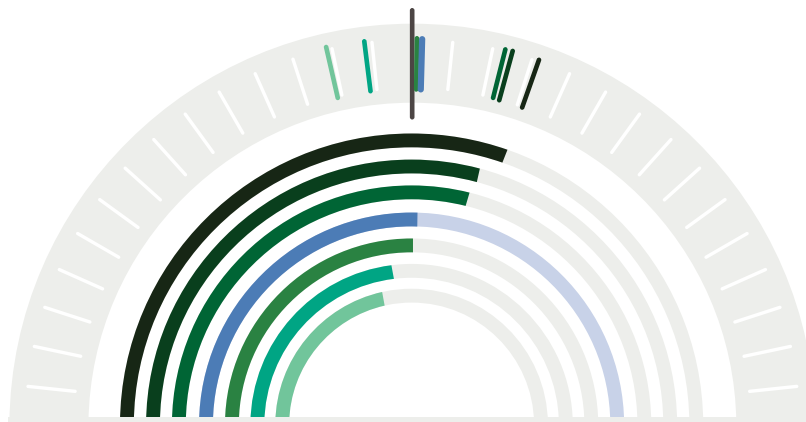
WORKFORCE PREPARATION

ASPIRATION

The region aligns workforce skills to employer needs.

CURRENT RANK 4th

INDICATORS DASHBOARD



DASHBOARD BREAKDOWN

AUSTIN	115.82
HARTFORD	113.10
RALEIGH	112.47
RICHMOND	101.47
NATIONAL AVERAGE	100.00
JACKSONVILLE	100.52
LOUISVILLE	94.02
MEMPHIS	89.64

PER CAPITA INCOME

The average income of the total population.

HARTFORD	\$36,615	LOUISVILLE	\$27,910
AUSTIN	\$32,549	JACKSONVILLE	\$27,439
RALEIGH	\$32,107	MEMPHIS	\$24,837
RICHMOND	\$31,741		

Source: U.S. Census, 2014 1-Year Estimate American Community Survey.

UNDEREMPLOYMENT

% Workers with a Bachelor's degree or higher who are employed in low skills jobs. Positive numbers indicate too many skilled workers for current occupations. Negative numbers show a deficit of skilled workers.

RALEIGH	9.3%	MEMPHIS	-1.8%
AUSTIN	4.9%	LOUISVILLE	-2.1%
HARTFORD	4.5%	JACKSONVILLE	-4.9%
RICHMOND	1.3%		

Source: JobsEQ, Chmura Economic and Analytics, 1st quarter 2015. U.S. Bureau of Labor Statistics, U.S. Census Bureau.

STEM-H JOBS

% Employment in growth industries related to science, technology, engineering, math, and healthcare.

AUSTIN	21.7%	RICHMOND	15.2%
RALEIGH	19.9%	LOUISVILLE	13.8%
HARTFORD	17.8%	MEMPHIS	13.7%
JACKSONVILLE	16.9%		

Source: JobsEQ, Chmura Economic and Analytics, 1st quarter 2015. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

The Dashboard values are indexed using the indicators above.

Why is this important?

These indicators are an important barometer in gauging the quality of the region's future workforce and its capacity to respond to the needs of employers. Paired with a strong educational foundation, the adequacy of workforce training programs to develop our talent pipeline, and the variety of employment opportunities contribute to the region's economic vitality.

Key Takeaways and Opportunities for Action

While our high school graduation rates are relatively strong, 45% of unemployed workers have only a high school diploma or less. What are we doing to "skill-up" our workforce earlier in the process? How can we further engage our schools and employers to ensure our talent pipeline is competitive in high demand occupations?

DID YOU KNOW?

The region is expected to see over 17,000 new jobs in STEM-H¹ industries over the next 10 years

COLLABORATION AT WORK

CODE RVA

DR. JAMES LANE
SUPERINTENDENT OF GOOCHLAND
COUNTY PUBLIC SCHOOLS



CodeRVA is a new school being created in the Richmond area with a High School Innovation Grant and support from all of the Region 1 (Richmond-metropolitan area) School Divisions. The school will focus on preparing

students to learn to code and/or work in the computer science field. All students will finish their high school diplomas in two years and then move on to a two-year degree in partnership with John Tyler and Reynolds Community Colleges. Additionally, through a partnership with MaxxPotential, students will complete paid apprenticeships working in real jobs in the computer science/coding field. Thus, the project will ensure that all students are both college AND career ready. The planning committee for the school is collaborating with several local businesses, nonprofits, and higher education organizations to create this new, innovative high school model including, but not limited to, CarMax, CapitalOne, RichTech, CodeVA, VCU, and the University of Richmond. The regional school opens in the fall of 2017 and will accept students on a lottery basis with slots available for students from each county. For more information, please contact your local school division and a website will be available in early 2016.

The Workforce Skills-Gap

JAMISON MANION

President, Workforce Engagement Solutions, LLC



To understand the “skills-gap,” we must compare the suitability of those seeking work against current posted

job openings, and determine whether both seasoned and entry level job seekers are preparing appropriately for jobs projected to be in demand.

In the current labor market, job seekers slightly outnumbered posted opportunities (December 31, 2015 VEC). This indicates a tightening of the labor market that is imbalanced among occupations. Delving into Chmura Analytics, JobsEQ® data from the 3rd quarter 2015, the occupations with the greatest imbalance include construction (4.5 job seekers : 1 open job), building and grounds maintenance (3.8:1), personal care and service (3.1:1), production (3:1), transportation (3:1), and healthcare support (2.8:1). Those seeking positions in these fields can expect strong competition, as well as downward pressure on wages. Whereas available management positions match the number of job seekers (1:1), healthcare technicians and practitioners have a slight imbalance (1.2:1).

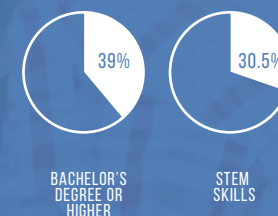
The imbalance reflected by the numbers doesn't show a complete picture. According to the Brookings Institute, 39% of the jobs posted in the Richmond Region require STEM skills with 30.5% requiring a bachelor's degree or higher. The skills and education of many job seekers may not be adequate since the Virginia Employment Commission estimates that 45% of the unemployed have a high school diploma or less. This gap is reflective in the number of days required to fill a position: 50.2 days for healthcare practitioners and technicians as compared to 27 days for production and 22 days for administrative support.

The final factor to consider is the future of the labor market. Over the next 10 years in the Richmond Region, the fastest growing occupation is expected in Healthcare Support. The highest replacement demand is expected in Office and Administrative Support and Sales occupations. Yet one of the largest areas in which people are being trained is “Education, Training, and Library Occupations” – according to current projections there will be 3 job seekers for every opening. The skills gap will continue as long as large portions of the workforce remain untrained or trained in fields that are not in demand.

ANALYZING THE SKILLS-GAP

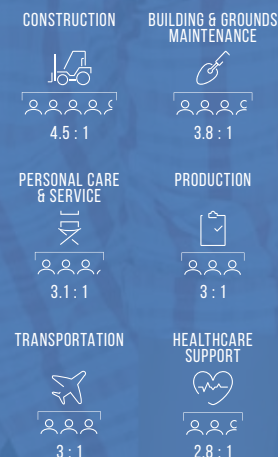
Job Requirements

According to the VEC analysis of the jobs posted in the Richmond Region.



Occupational Imbalance

Job Seekers : Open Jobs



SOURCES & EXPLANATIONS

1. Source: JobsEQ, Chmura Economic and Analytics, 1st quarter 2015. U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

STEM-H stands for Science, Technology, Engineering, Math, and Health.

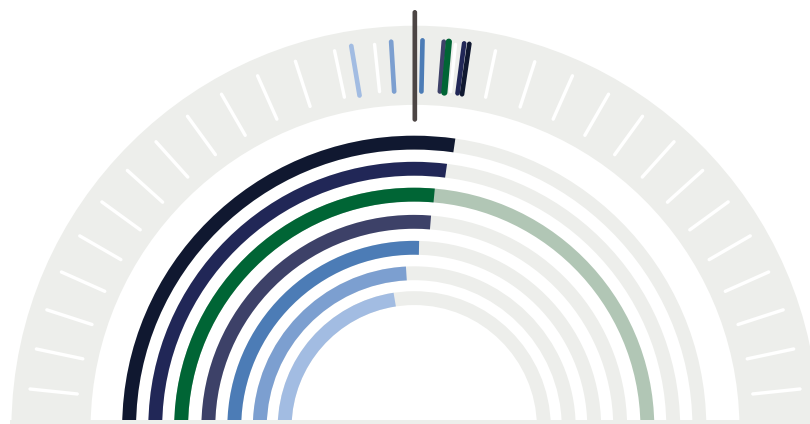
SOCIAL STABILITY

ASPIRATION

The region embraces our social diversity as a strong community asset and supports a community where all residents have the opportunity to succeed.

CURRENT RANK **3rd**

INDICATORS DASHBOARD



DASHBOARD BREAKDOWN

RALEIGH	106.57
HARTFORD	106.35
RICHMOND	104.76
AUSTIN	104.54
LOUISVILLE	100.89
NATIONAL AVERAGE	100.00
JACKSONVILLE	97.93
MEMPHIS	93.53

POVERTY RATE¹

% of people living below the federal poverty line.

HARTFORD	11.1%	AUSTIN	15.1%
RALEIGH	12.2%	JACKSONVILLE	15.4%
RICHMOND	12.8%	MEMPHIS	20.3%
LOUISVILLE	14.5%		

HOUSEHOLD INCOME¹

Median Household Income.

HARTFORD	\$68,532	JACKSONVILLE	\$51,117
AUSTIN	\$63,603	LOUISVILLE	\$50,932
RALEIGH	\$62,313	MEMPHIS	\$45,844
RICHMOND	\$60,936		

RECEIVING SNAP (FOOD STAMPS)¹

% of households receiving SNAP benefits.

RALEIGH	9.2%	LOUISVILLE	14.2%
AUSTIN	9.9%	JACKSONVILLE	15.6%
RICHMOND	11.1%	MEMPHIS	20.2%
HARTFORD	14.2%		

HOMELESS

% of the population that is homeless determined by a bi-annual point in time count.

HARTFORD	0.08%	AUSTIN	0.18%
RICHMOND	0.08%	JACKSONVILLE	0.18%
RALEIGH	0.12%	MEMPHIS	0.18%
LOUISVILLE	0.17%		

Source: Dept of Housing and Urban Development (HUD) as reported by Continuums of Care (COC), January 2014.

COST BURDENED HOUSEHOLDS¹

% of the population paying 30% or more of gross income on housing costs.

LOUISVILLE	29.0%	AUSTIN	35.3%
RALEIGH	29.8%	JACKSONVILLE	37.1%
RICHMOND	32.2%	MEMPHIS	37.7%
HARTFORD	35.2%		

1. U.S. Census, 2014 1-Year Estimate American Community Survey.

The Dashboard values are indexed using the indicators above.

Why is this important?

Economic prosperity requires communities that are not just surviving, but thriving. The “cost of poverty” is substantial: in 2014, \$793 million in Federal, State and local funds was spent toward subsistence payments to the nearly 2,000 families needing assistance in the region.

Key Takeaways and Opportunities for Action

One area of social stability where we’ve seen real progress is in combating homelessness. Much of this success can be attributed to the alignment and collaboration of our service providers. How can we foster similar collaborative efforts throughout this, as well as our other, priority areas?

DID YOU KNOW?

The highest concentration of households in poverty¹ in our region lives within only one percent of the land area.

COLLABORATION AT WORK

THE HOUSING PLAN

LAURA LAFAYETTE
CHIEF EXECUTIVE OFFICER,
RICHMOND ASSOCIATION OF REALTORS®



Released in 2015 by the Partnership for Housing Affordability (PHA), “Housing the Richmond Region*” offers a sobering look at affordable housing in the Richmond Region. In each and every jurisdiction, more than 25% of residents are cost burdened—

spending more than 30% of their gross monthly income on housing. The difference between what our citizens collectively can afford to pay for housing and what they actually pay is a staggering \$862 million annually. This means thousands of Richmond area residents are unable to save for retirement, save for children’s college education, and make the discretionary purchases that are the lifeblood of small businesses and our regional economy.

Closing the gap requires concerted, collaborative efforts on multiple but related fronts. Quality education, workforce preparedness, and access to employment are essential if residents are to secure jobs that pay sustainable wages. Partnerships in the public, private, and nonprofit sectors offer creative strategies to build new and preserve existing affordable housing units. We are making progress, though, with a greater focus on career/technical education aligned with in-demand jobs; Bus Rapid Transit as a precursor to more regional transit; and innovative housing strategies, such as the region’s first Community Land Trust.

*By the researchers of Virginia Tech and Virginia Commonwealth University

The State of
Childhood Poverty

DAVE NORRIS

Director of Community Impact: Income at
United Way of Greater Richmond & Petersburg



A recent VCU study found that a child growing up in Richmond’s Gilpin Court neighborhood, where poverty is

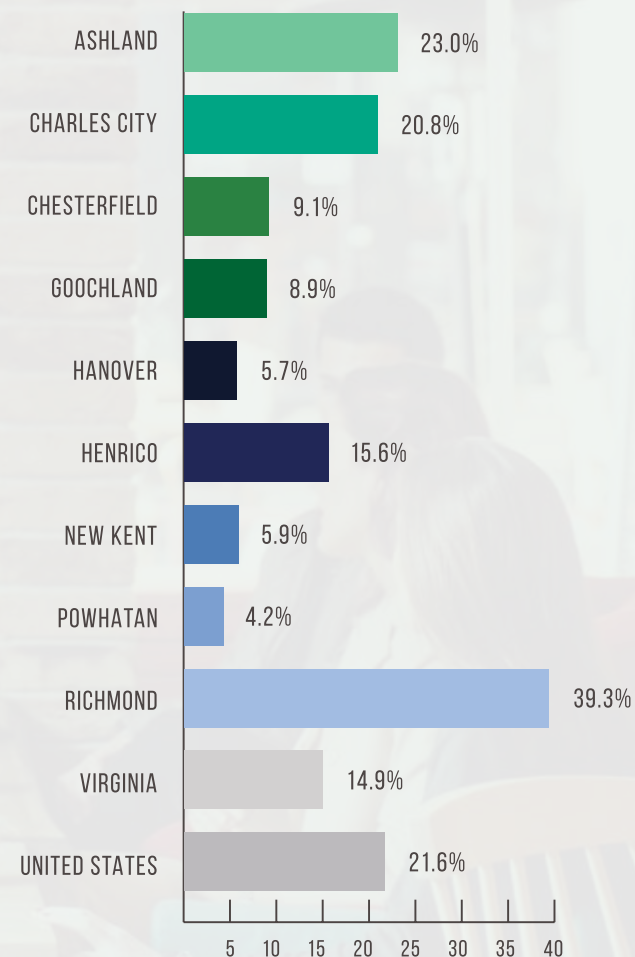
endemic, has approximately the same life expectancy as a child growing up in Haiti—the poorest country in the Western Hemisphere. We know there are many factors that contribute to family poverty, and thankfully there are numerous nonprofit and public sector organizations working to counter them—by improving access to gainful employment, quality educational opportunities, better housing, safer neighborhoods, and the critical tools that families need to attain financial stability (financial literacy, savings, assets, etc.). Clearly, though, much work remains to be done.

SOURCES & EXPLANATIONS

1. Concentration of Poverty, Source: U.S. Census, 2013 5-Year Estimate American Community Survey.

CHILDREN LIVING
IN POVERTY

% of children living below the
federal poverty level.



Source: U.S. Census, 2014 5-Year Estimate American Community Survey.

HEALTHY COMMUNITY

ASPIRATION

The region transforms into a metro area known for an active lifestyle.

CURRENT
RANK **4th**

INDICATORS DASHBOARD



DASHBOARD BREAKDOWN

AUSTIN	161.25
RALEIGH	133.89
HARTFORD	116.24
RICHMOND	110.54
NATIONAL AVERAGE	100.00
JACKSONVILLE	97.07
LOUISVILLE	87.35
MEMPHIS	85.90

HEART DISEASE

Represents deaths from heart disease per 100,000 of the population.

AUSTIN	87.9	RICHMOND	179.8
RALEIGH	110.2	HARTFORD ¹	193.1
MEMPHIS ²	152.9	LOUISVILLE ²	197.2
JACKSONVILLE	178.3		

Source: Data was derived from each respective state department of health for 2013. 1. CDC WONDER, 2013. 2. Represent data from multiple state departments of health. These metro areas have counties in multiple states.

DIABETES

Represents deaths from diabetes per 100,000 of the population.

AUSTIN	10.0	JACKSONVILLE	25.0
RALEIGH	14.2	LOUISVILLE ²	25.5
RICHMOND	19.3	MEMPHIS ²	35.7
HARTFORD ¹	19.7		

Source: Data was derived from each respective state department of health for 2013. 1. CDC WONDER, 2013. 2. Represent data from multiple state departments of health. These metro areas have counties in multiple states.

EMPLOYED IN HEALTHCARE

Health care as a % of overall employment. Health care industry includes both health care and social assistance sub-industries.

HARTFORD	16.7%	LOUISVILLE	13.6%
RICHMOND	14.7%	AUSTIN	11.1%
JACKSONVILLE	14.2%	RALEIGH	10.4%
MEMPHIS	13.8%		

Source: JobsEQ, Chmura Economic and Analytics, 1st quarter 2015; U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

The Dashboard values are indexed using the indicators above.

Why is this important?

A healthy region is essential to building a productive society. Every community needs a healthy workforce upon which to build its economy, healthy students better equipped to learn and succeed academically, and healthy citizens able to fully participate and contribute to society. The indicators here represent health issues that have preventable factors, either through increased access or lifestyle choices.

Key Takeaways and Opportunities for Action

Although we have a robust healthcare system in the Richmond Region, there are regions (like Austin) who are leading the way on combating preventable diseases by focusing on nutrition and a more active lifestyle. Beyond typical health measures, there is significant research now on health equity and the impact of education and poverty on health, making it essential to collaborate with other priority areas.

DID YOU KNOW?

Health and zip codes are connected. Life expectancy for residents in Gilpin Court is 20 years less than for those in Westover Hills.¹

COLLABORATION AT WORK

RVA FOOD COLLABORATIVE

ANNE DARBY
RVAFC MEMBER



The RVA Food Collaborative (RVAFC) brings together the hundreds of people and dozens of organizations and businesses across our region working to improve our food system. We focus on food system localization, closing the hunger gap, and improving food access. Through

regular meetings and information sharing, RVAFC members established the Capital Area Farmers Market Association, a collaboration among 20 markets, that launched the Back to the Market campaign and held three pop-up markets and community fairs in underserved “food deserts” in Richmond and Goochland County.

The RVAFC secured a \$100K grant from the Mary Morton Parsons Foundation for a mobile farmers market. The food system localization subgroup adopted the name Real Local RVA and is launching a local food branding campaign, as well as a comprehensive local food guide listing all restaurants, farms, grocers, markets, and other businesses where consumers can purchase local food. The Food Access Task Force, housed at the Richmond City Health District, has secured funding through the Virginia Department of Agriculture and Consumer Services to conduct a gap analysis for food access in Richmond, and fund the Healthy Corner Store program. RVAFC members also work to promote regional priorities at the state level through the Virginia Food System Council and the Commonwealth Council on Bridging the Nutritional Divide.

SELF-REPORTED PHYSICAL ACTIVITY

The percent of people who self-reported any physical activity or exercise in the past 30 days.



ACSM American Fitness Index, 2015. This information is used in the ActiveRVA Fitness Scorecard.

2015 AMERICAN FITNESS INDEX® RANKING

The American Fitness Index (AFI) is part of a study prepared by the American College of Sports Medicine to rank the 50 largest metropolitan areas in the United States based on personal and community health.

HARTFORD	11	JACKSONVILLE	35
RALEIGH	13	LOUISVILLE	46
RICHMOND	18	MEMPHIS	49
AUSTIN	20		

SOURCES & EXPLANATIONS

1. Virginia Commonwealth University Center on Society and Health, 2014.

The VCU Center on Society and Health has mapped the life expectancy of neighborhoods across the country. The map reveals that there is up to a 20-year difference in life-expectancy for children born in and around Richmond.

COORDINATED TRANSPORTATION

COMMUTERS

% of the population 16 years+ who commute to work by driving alone.

AUSTIN	76.6%	RICHMOND	81.8%
RALEIGH	80.0%	LOUISVILLE	81.8%
JACKSONVILLE	80.4%	MEMPHIS	84.9%
HARTFORD	81.4%		

Source: U.S. Census, 2014 1-Year Estimate American Community Survey.

COMMUTER DELAYS

Annual hours of delay per peak auto commuter.

RICHMOND	34	LOUISVILLE	43
RALEIGH	34	HARTFORD	45
JACKSONVILLE	38	AUSTIN	52
MEMPHIS	43		

Source: Texas Transportation Institute, 2015 Urban Mobility Scorecard and Appendices.

COMMERCIAL AIR TRAVEL

Number of passengers annually.

AUSTIN	5,219,982	MEMPHIS	1,800,268
RALEIGH	4,673,869	RICHMOND	1,671,096
HARTFORD	2,913,380	LOUISVILLE	1,634,983
JACKSONVILLE	2,589,198		

Source: Federal Aviation Administration, 2014 Passenger Boardings at Commercial Service Airports.

TRANSIT COVERAGE

Share of working-age residents near a transit stop.

HARTFORD	63%	AUSTIN	47%
LOUISVILLE	60%	RALEIGH	46%
JACKSONVILLE	58%	RICHMOND	31%
MEMPHIS	51%		

Source: Brookings Institute, Missed Opportunity: Transit and Jobs in Metropolitan America, May 2011.

The Dashboard values are indexed using the indicators above.

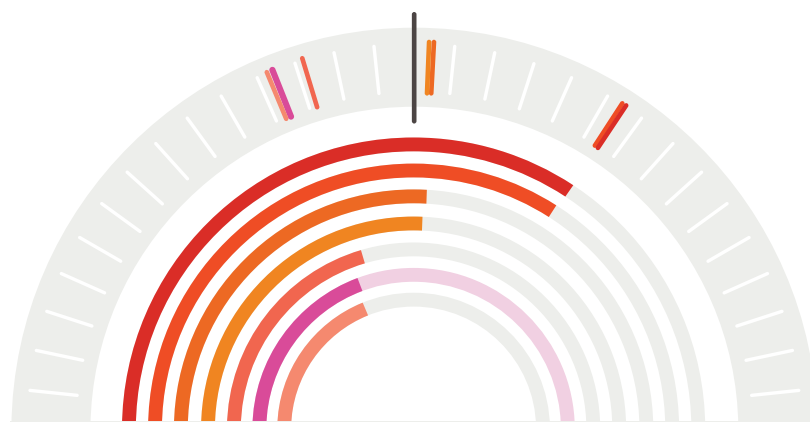
ASPIRATION

The region maintains its status as one of the most uncongested transportation networks in the country while supporting all modes of transportation.

CURRENT RANK

6th

INDICATORS DASHBOARD



DASHBOARD BREAKDOWN

AUSTIN	127.79
RALEIGH	127.62
HARTFORD	102.53
JACKSONVILLE	102.06
NATIONAL AVERAGE	100.00
LOUISVILLE	86.09
RICHMOND	82.48
MEMPHIS	81.56

Why is this important?

Coordinated transportation is essential both to building our economy and maintaining a high quality of life. This is true regionally as people often cross geographic boundaries to work, live, and play. This coordination is becoming increasingly important in our global economy where economic opportunities are often related to the mobility of people, goods and information.

Key Takeaways and Opportunities for Action

The Richmond Region's location at the mid-point of the East Coast with easy freight access to 50% of the US population offers huge advantages. Travel in a personal vehicle throughout the region is also a plus with low congestion. Alternative travel choices within the region are limited by public transit that covers primarily the City of Richmond and immediate surroundings. 80% of the workforce live and work in the Richmond MSA, making cross-region commuting options essential for a vibrant workforce.

DID YOU KNOW?

We're the 8th lowest ranked metro with regard to transit coverage and job access.¹

COLLABORATION AT WORK

PORT OF RICHMOND

SAMUEL S. YOUNG, JR.
PRESIDENT OF ASTYRA CORPORATION
CHAIR OF THE GREATER RICHMOND CHAMBER OF COMMERCE



The 2015 long-term lease agreement between the City of Richmond and the Virginia Port Authority (VPA) for the Port of Richmond creates one of the greatest economic development opportunities our region has seen. Richmond's Future, a local think tank, identified development of

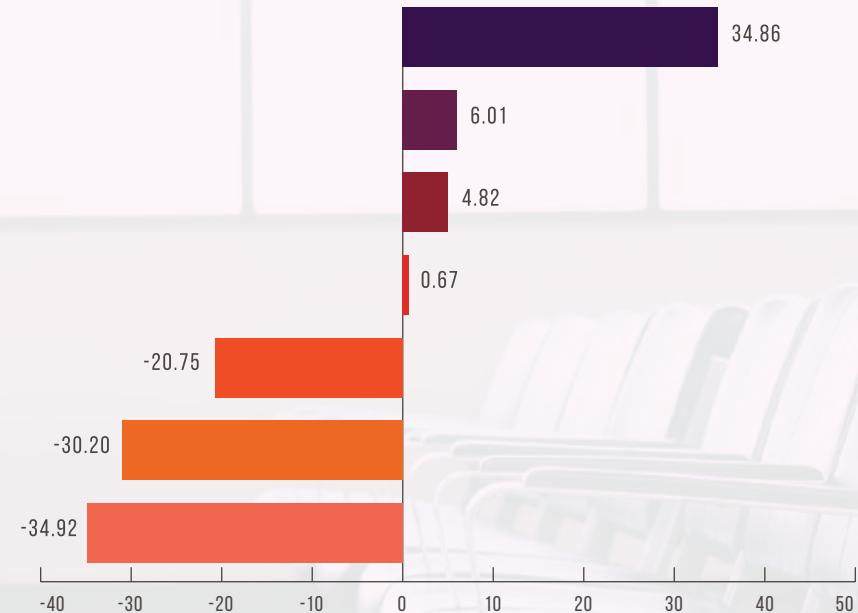
the Port as a key to the creation of a logistics hub in our region. The financial strength, global connections and expertise of the VPA combined with the infrastructure work the Richmond Regional Transportation Planning Organization and the City of Richmond have already begun to jump-start our opportunities and increase the traffic into and out of our Port. The jobs and business opportunities that will be created will benefit not only the city (lifting some of the residents out of the pockets of poverty) but will spread out into the surrounding counties as well. The growth of RVA as a logistics hub is truly a regional opportunity that will require regional cooperation to maximize.

SOURCES & EXPLANATIONS

1. Source: Brookings Institute, Missed Opportunity: Transit and Jobs in Metropolitan America, May 2011. 100 largest metros were assessed.

NET EXPORTS BY REGION

In billions.



Peer Region	Origin (Export)	Destination (Import)	Net Commodity Flows
HARTFORD	\$93,671,536,199	\$58,807,093,716	\$34,864,442,483
JACKSONVILLE	\$67,581,883,256	\$61,574,900,575	\$6,006,982,681
RALEIGH	\$53,415,255,538	\$48,599,744,301	\$4,815,511,237
RICHMOND	\$37,752,062,935	\$37,084,799,874	\$667,263,061
AUSTIN	\$30,059,889,238	\$50,811,515,599	-\$20,751,626,361
LOUISVILLE	\$53,171,110,424	\$83,366,725,656	-\$30,195,615,232
MEMPHIS	\$93,960,584,266	\$128,882,512,734	-\$34,921,928,468

Source: Federal Highway Administration, Freight Analysis Framework (FAF), 2012. Does not include commodity flow within region and commodity flow from foreign origination with final destination outside region.

JAMES RIVER

ASPIRATION

The region will make the James River a centerpiece for entertainment, recreation, and commerce.

DID YOU KNOW?

8,441 hours were logged by volunteers on the James River.¹

Why is this important?

The James River is one of our region's most important natural resources. In fact, more than 1/3 of all Virginians rely on the James River and its tributaries for water, commerce, and recreation.

Recreation Value

There are 75 public access sites to the James River in the region; their operation and maintenance is handled by various entities, from state agencies, to local governments, to private organizations. Although only a fraction of these sites maintained visitation data, 1.2 million visits were recorded throughout the region during the 2014 peak season (April-September). The highest monthly average of visitors was 50,000 at Belle Isle (north + south).

River Role Models

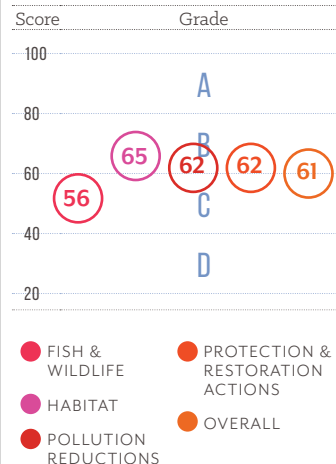
The James River is unique among our peer regions, but we can learn from best practices in other communities.

- » Incorporating the river into school curriculum has always been a priority in Hood River, Oregon, but in 2012, they built a “green” middle school to connect kids with their environment.
- » The “Fiesta San Antonio” attracts more than 3 million people and boasts a \$284 million economic impact on the city.
- » The Chicago Water Taxi provides seven-day a week water transportation service to commuters and tourists on every branch of The Chicago River. Since 1962, it has safely carried an estimated 4 million passengers.

The State of the River

The State of the James River Report Card², produced by the James River Association, provides a status report on the health of this shared natural resource. To learn more about the indicators examined and opportunities for protection and restoration, check out www.StateoftheJames.org.

2015 REPORT CARD



MAP KEY: JAMES RIVER VISITATION

Park/Access Point	Seasonal Total
1 POWHATAN STATE PARK	28,982
2 ROBIOUS LANDING PARK	130,278
3 FLATWATER	48,686
4 PONY PASTURE	175,711
5 TEXAS BEACH	58,256
6 42 ND STREET	18,078
7 REEDY CREEK	64,124
8 BELLE ISLE NORTH	230,912
9 BELLE ISLE SOUTH	86,168
10 OSBORNE BOAT LANDING	78,003
11 DUTCH GAP BOAT LANDING	194,375
12 HENRICUS PARK	82,537
13 DEEP BOTTOM	31,374
GRAND TOTAL:	1,227,484

Compiled by the Richmond Regional Planning District Commission, 2015.



SOURCES & EXPLANATIONS

1. James River Park System volunteers in 2015.
2. The State of the James refers to a larger geographic footprint than the CRC region.

Quality
of Life

2.4

QUALITY PLACE

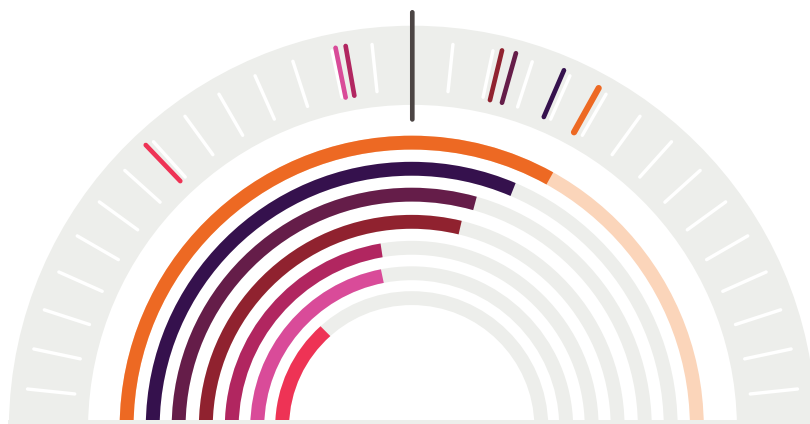
ASPIRATION

The region is the most appealing and attractive destination for arts, culture, and entertainment on the East Coast.

CURRENT
RANK

1st

INDICATORS DASHBOARD



DASHBOARD BREAKDOWN

RICHMOND	124.33
AUSTIN	119.50
HARTFORD	113.38
RALEIGH	111.78
NATIONAL AVERAGE	100.00
LOUISVILLE	92.28
JACKSONVILLE	90.36
MEMPHIS	64.19

EMPLOYMENT IN CULTURE

Culture as a % of overall employment.
Culture industry includes arts, culture and recreation.

AUSTIN	2.4%	LOUISVILLE	1.7%
RICHMOND	2.1%	RALEIGH	1.2%
JACKSONVILLE	1.9%	MEMPHIS	1.0%
HARTFORD	1.7%		

Source: JobsEQ, Chmura Economic and Analytics, 1st quarter 2015.
U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

AIR QUALITY

The Number of "good" air quality days in 2014.

RICHMOND	291	MEMPHIS	240
AUSTIN	262	RALEIGH	232
JACKSONVILLE	257	LOUISVILLE	122
HARTFORD	249		

Source: Environmental Protection Agency, Air Quality Index (AQI), 2014.

CRIME RATE

Violent crimes per 100,000 people.

RALEIGH ¹	219.3	LOUISVILLE	395.0
RICHMOND	232.2	JACKSONVILLE	561.1
HARTFORD	252.2	MEMPHIS	1,033.5
AUSTIN	290.9		

Source: Federal Bureau of Investigation, 2014. Violent crimes include murder, rape, robbery, and aggravated assault.

1. Includes FBI statistics from 2013. 2014 statistics was not available for the Raleigh, NC metro area.

The Dashboard values are indexed using the indicators above.

Why is this important?

Quality of life is important to attracting a young, talented workforce. For-profit businesses and nonprofits help to brand the region as an exciting place to live and work, create jobs across a broad range of talents, generate tax revenues for the region, attract tourists, and help to develop and retain talent.

Key Takeaways and Opportunities for Action

In 2013, the Richmond Future's YRVA study found that the most attractive attributes for young professionals in a city were the food scene, safety, bikeability/walkability, a variety of employment options, outdoor recreation, affordable housing, and a place that embraces innovation. How do we continue building our region as a hub of these types of activities and capitalize on the many positive accolades RVA has recently been awarded?

DID YOU KNOW?

RVA topped 8 "Top 10" lists in 2015, in everything from chefs to biking to museums.¹

Moving
Forward

2016

LOOKING AHEAD

NEXT STEPS FOR THE CAPITAL REGION COLLABORATIVE

The Capital Region Collaborative is about helping unlock the full potential of the Richmond Region.

This snapshot is intended to be a catalyst—for both discussion and action. Moving forward, action teams in each priority area will develop and implement goals, policy options, and projects to achieve our region's shared vision. Each year, we will evaluate the indicators and report back on progress.

How to get involved.

LEARN MORE.

This snapshot provides some of the background, baseline indicators, and opportunities for action in each of our priority areas. **Check our website—www.capitalregioncollaborative.org—and follow us for deeper analysis and continued updates.**

 [CapitalRegionCollaborative](#)  [CRCollaborative](#)

ADOPT A PRIORITY.

Choose one area where you commit to make a difference. Whether it's you, your family, your school, or your business, you can rally support around an area to drive impact.

DONATE.

Nonprofits and foundations across our region are focused on moving us forward in the 8 priority areas. **Support the causes and priorities you care about by donating.**

VOLUNTEER.

We're excited to partner with HandsOn Greater Richmond to make sure **volunteer opportunities (for you or a group) are available in the 8 priority areas.** Learn more at www.handsonrva.org.

COLLABORATION AT WORK

INNOVATION COUNCIL

CARRIE ROTH

PRESIDENT/CEO, VIRGINIA BIOTECHNOLOGY RESEARCH PARK



The Virginia Biotechnology Research Park (VBRP) Corporation Board has broadened its focus from the traditional brick-and-mortar 34-acre park in downtown Richmond to an “Innovation Council” capable of fostering innovation, entrepreneurship

and commercial success across the larger region.

The Council focuses on leveraging the uniqueness of many individuals and organizations to create a more holistic innovation ecosystem to harness collaborative strengths. This shift is paramount to economic growth—requiring revolutionary action for transformational change through a new strategic vision that builds on the Capital Region Collaborative recommendations to:

- » Lead a regional effort that fosters innovation in a concerted, collaborative framework;
- » Develop strategic goals and metrics to evaluate progress and accomplishments in innovation;
- » Identify gaps and sources to fill the gaps to sustain a successful innovation ecosystem;
- » Leverage activity and support of strong regional components of the innovative and advanced technologies of the ecosystem, including life sciences; and
- » Integrate the VBRP site to better define the sense of place as part of a larger, cohesive, coordinated district for a knowledge-based community.

Thank you

Thanks to the members of the Capital Region Collaborative’s Organizing Council and all the other contributors and reviewers of the Snapshot.

Without generous funding and support, the work of the CRC would not be possible.

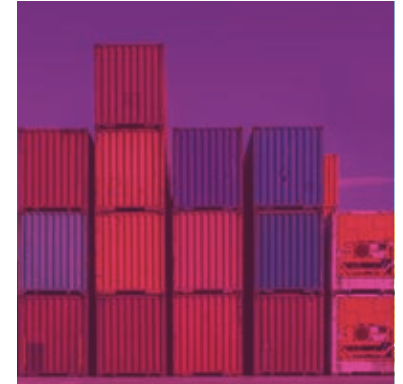
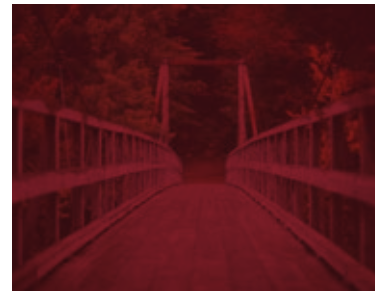
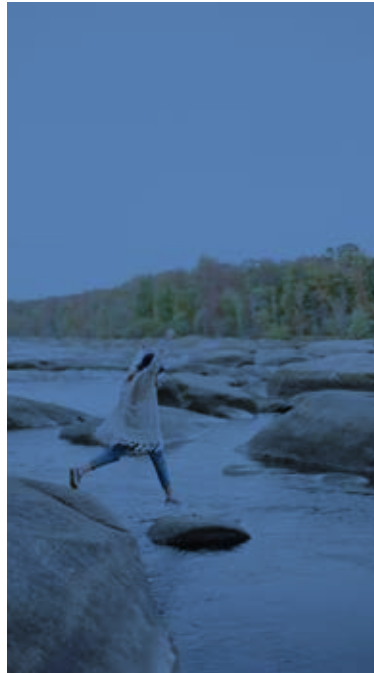
ALTRIA	HANOVER COUNTY
BANK OF AMERICA	HENRICO COUNTY
CAPITAL ONE	THE JACKSON FOUNDATION
CARMAX	LUCK COMPANIES FOUNDATION
CHARLES CITY COUNTY	NEW KENT COUNTY
CHESTERFIELD COUNTY	POWHATAN COUNTY
CITY OF RICHMOND	RICHMOND MEMORIAL HEALTH FOUNDATION
THE COMMUNITY FOUNDATION	ROBINS FOUNDATION
THE DOMINION FOUNDATION	TOWN OF ASHLAND
THE GENWORTH FOUNDATION	WESTROCK
GOOCHLAND COUNTY	

In addition to primary data sources, thanks to our local data and subject matter experts:

ACTIVERVA	FEDERAL RESERVE BANK OF RICHMOND
BRIDGING RICHMOND	RICHMOND MEMORIAL HEALTH FOUNDATION
THE CENTER FOR WORKFORCE INNOVATION	RICHMOND REGIONAL TOURISM
CULTURE WORKS	THE RICHMOND REGIONAL TRANSPORTATION PLANNING ORGANIZATION
GREATER RICHMOND CHAMBER OF COMMERCE	RICHMOND’S FUTURE
GREATER RICHMOND PARTNERSHIP	UNITED WAY OF GREATER RICHMOND & PETERSBURG
JAMES RIVER ASSOCIATION	VIRGINIA BIOTECHNOLOGY RESEARCH PARK
PARTNERSHIP FOR HOUSING AFFORDABILITY	VIRGINIA COMMONWEALTH UNIVERSITY
RICHMOND REGIONAL PLANNING DISTRICT COMMISSION	

Indicator
Report

2016



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RVA Snapshot | The 2016 Indicators Report

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