

Comprehensive Economic Development Strategy 2008



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South Central Planning and Development Commission



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Organization and Management

Legal Structure of the Organization

The South Central Planning and Development Commission (SCPDC) is one of eight (8) sub-state regional planning and economic development districts within the State of Louisiana. The district was created in 1972 by resolution passed by each member parish and municipality. At that time the Commission was also established as the Economic Development District (EDD) for the region. This enables assistance to the Commission and its member governments from the U.S. Department of Commerce Economic Development Administration (EDA). In 1977, the State of Louisiana formalized the eight sub-state planning districts with the passage of Act 472. SCPDC was designated under the act as Planning District 3.

Additionally, SCPDC is incorporated as a non-profit organization as provided in Louisiana Revised Statutes 12:201 et. seq., as amended. Activities must be consistent with accomplishing the purpose of a regional planning or economic development district and for charitable, educational and scientific research purposes. The Commission currently operates under Articles of Incorporation, Commission By-Laws, Administrative and Personnel Policies.

Brief Description of the Planning Process

The U. S. Economic Development Administration (EDA) mandates development of and provides guidance for the development of a Comprehensive Economic Development Strategy (CEDS). The EDA has designed the CEDS as a vehicle for bringing together the public and private sectors to create an economic roadmap for the purpose of fostering diversity in order to strengthen regional economies. The CEDS analysis leads to the establishing of goals and objectives for the regional economy and the identification of investment priorities and possible funding sources to aid implementation. Thus, the CEDS is the product of a continuous process of strategic economic development planning and action that involves both public and private participation.

In the South Central District, the CEDS process is coordinated at the regional level and usually implemented locally at the parish or municipal level. Most member parishes maintain independent economic development committees, which formulate concepts, goals and objectives specific to their communities. The South Central Planning and Development District has a regional Strategy or CEDS Committee composed of public and private representatives from member governments and communities. The CEDS Committee incorporates community-level economic development goals into the larger regional Action Plan. Yearly CEDS updates include progress in advancing goals and objectives at both the regional and local levels, as well as any noteworthy changes in the region's economy.

Each year SCPDC conducts an annual review of the CEDS with a committee of economic development professionals active in the region. The purpose of the review is to monitor progress toward goals and objectives and to update the Action Plan to

respond to current conditions. Participating in the annual review allows regional economic development practitioners to revisit the goals and objectives, and to recognize accomplishments. The process also affords regional economic development practitioners an opportunity to identify constraints to and potentials for development within each parish and in the region as a whole. Practitioners' collective knowledge is applied to the updating of the regional implementation strategy. The strategy that results is approved by the Regional CEDS Committee, which is the SCPDC Board of Commissioners. The approved CEDS is then submitted to EDA.

Participants in the 2008 regional CEDS review process have recommended quarterly meetings to provide regular updates to the regional strategy. This will help ensure that the regional CEDS is a living document with the flexibility necessary to meet ongoing regional needs.

Local Contact for the SCPDC CEDS

For more information on the CEDS process or specific economic development programs contact:

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Areas Included in the Economic Development Plan

The area included in the CEDS process is co-terminus with the geographic jurisdiction of the South Central Planning and Development Commission. This includes the parishes of Assumption, Lafourche, St. Charles, St. James, St. John the Baptist, and Terrebonne. Also included in the economic development planning process are the six (6) municipal members of SCPDC: Golden Meadow, Gramercy, Lockport, Lutchter, Napoleonville, and Thibodaux. The City of Houma was consolidated with Terrebonne Parish in 1983 to form a single government called the Terrebonne Parish Consolidated Government.

Terrebonne and Lafourche Parishes make up the Houma Metropolitan Statistical Area (MSA). St. Charles and St. John the Baptist Parishes are part of the New Orleans MSA. The South Central District is roughly bounded by Lake Pontchartrain on the east, the Gulf of Mexico on the south, and the Atchafalaya River to the west. The total area exceeds 4,400 square miles. Thibodaux, located approximately 60 miles southwest of New Orleans, is the district's geographic center. The distance from Thibodaux to Baton Rouge is 68 miles and the distance to Lafayette is 103 miles.

Report Organization

The Comprehensive Economic Development Strategy is a mechanism for coordinating the efforts of those concerned with economic development and improving the overall quality of life of the community. The CEDS comprises four main elements:

- An Analysis of the regional economy and the external trends and forces that impact it.
- A Vision encompassed in the statement of the region's goals.
- The Action Plan developed to implement the goals.
- An Evaluation to determine the effectiveness of the Action Plan and to identify any adjustments, improvements or changes that should be made in the strategy.

Board Members and Planning Committee

In December 1991, the SCPDC's Board of Commissioners approved amendments to the Commission's by-laws that enabled the expansion of the Board from 18 to 24 seats in order to add private sector representation. Under the 24 seat system, 6 seats are filled by the Parish Presidents, 6 seats are filled by the Mayors of the municipalities, 6 seats are filled by minority representatives selected by the parishes. The additional 6 seats are filled by private sector representatives selected by the parishes. The individual parish economic development committees are composed of representatives selected by each parish under differing rules specific to each. The Appendix contains a list of the SCPDC Board of Commissioners, as well as a list of participants in the annual CEDS update and review process.

The CEDS as Strategic Regional Infrastructure and Marketing Plan

SCPDC has broadened the scope of this update to the regional CEDS. A number of regional development organizations have suggested that a plan that both identifies critical infrastructure needs and can be used as a tool to market the area to outside business and industry could help strengthen and diversify the regional economy. It is understood that while each parish and the Bayou and River parishes may have slightly different needs, those needs are closely interrelated. The CEDS as marketing tool can help define and build on common ground to foster development of the region as a whole.

Emergency Planning

In the wake of Hurricanes Gustav and Ike, this update to the CEDS also includes preliminary elements that could be incorporated into pre-planning for emergency response to future disasters.

Economic History and Economic Development

Economic History

The economic history of South Central Louisiana is tied to the region's abundant natural resources and assets. Fisheries and wild-life made it possible to live off the land and the waters. Rich soils and a mild climate were suitable for a variety of crops. Natural waterways like the Mississippi River and the bayous along former distributaries of the River supported waterborne commerce. Cypress lumbering and milling and sugar cane cultivation, milling and refining became early economic mainstays. In pre-highway days, the river was the sole trading link between the nation's bread basket in the upper Midwest and the Gulf of Mexico. This region's cypress forests once supplied railroad ties and wood-shake shingles to the nation. Its wildlife and fisheries provided food, as well as furs and other items for trading. Later economic activity shifted to oil and gas exploration and production, with an extensive system of pipelines constructed to transport raw products for processing. Man-made waterways like the Gulf Intracoastal Waterway (GIWW) have supplemented the natural water arteries.

Opportunities based on the area's natural endowments attracted the richly varied mix of ethnic groups that settled the South Central region. Early Native American people built monumental mounds believed to be among the oldest in North America. European settlement brought successive waves of Spanish, French, German, Irish and English. Some settlers brought African slaves to work the large plantations along the Mississippi River and bayous. Other slaves learned and practiced skilled trades.

The diverse people joined to create the region's rich and unique mix of language, food, music and art. Multicultural influences are reflected in varied musical traditions (Cajun, Jazz, Gospel), in the unique food (gumbo, courtbouillion, jambalaya), and in local place names (Lake Cataouche, Des Allemands, Attakapas Landing, Hahnville, Convent, LaPlace, Houma, Terrebonne, Lafourche).

Current Economic Situation: After Katrina and Rita

The region's current economic situation offers both opportunities and challenges. Three years afterward, the predominant factor continues to be long-term impacts and recovery from two of the most destructive hurricanes ever recorded. Katrina and Rita struck within a month's time in August and September of 2005. While the South Central Parishes avoided the degree of devastation experienced in the New Orleans Metropolitan area, the storms did damage an estimated 10,000 homes in the region. Immediately after Katrina, the people of the South Central region acted quickly and with characteristic generosity to assist neighbors displaced from the city and its environs. Many local families sheltered evacuated family and friends and even strangers. Civic and recreation centers in Houma and Thibodaux and campus buildings at Nicholls State University were opened as public shelters. Regional hospitals cared for the ill and injured. Local people and church groups donated clothing, food and services and provided a broad range of other assistance.

Rita, the second storm, had a more direct impact on the South Central region. A 15 foot storm surge breached and overtopped levees to flood much of southern Terrebonne Parish. This affected approximately 7,000 homes. The levees held in southern Lafourche Parish, but there was extensive flooding of businesses to the south of the flood protection system. Parts of St. Charles Parish also experienced significant flooding.

The greatest impacts in the SCPDC region happened offshore and on the coast. Gulf storm surge of 12 to 20 feet ate away at restoration projects intended to return the Isles Dernieres and Timbaliers barrier island chains to their function as the region's first line of defense. Katrina's surge and high winds damaged Grand Isle, the state's lone inhabited barrier island, which is located outside the district in Jefferson Parish, but only accessible by road through Lafourche Parish (www.laseagrant.org, October 8, 2005). Landward, the storms transformed approximately 217 square miles of Louisiana marsh to open water (Louisiana Department of Natural Resources). The cumulative losses leave communities and vital economic interests like Port Fourchon exposed to the open waters of the Gulf (Richardson and Scott). Land loss also allows saltwater intrusion to extend farther and farther inland. This has increased the cost for treatment of water from sources like Bayou Lafourche, which supplies all or part of water used in four parishes, three of them in the region. High salinity content as far north as central Lafourche Parish caused quality issues and the eventual closure of Valentine Paper, which had produced specialty medical papers.

Energy production infrastructure on the Outer Continental Shelf (OCS) off Lafourche and Terrebonne Parishes also took a beating. This area accounts for approximately 18% of the nation's domestic oil production. In May 2006, the U.S. Minerals Management Service (MMS) reported that Katrina and Rita had destroyed 113 offshore rigs and damaged another 52. The storms also damaged 457 pipelines. This was in addition to the 102 pipelines wrecked by underwater mudslides caused by Hurricane Ivan the previous year, despite that storm's not having a direct on-shore impact in Louisiana (Scott).

The hurricanes pounded the region's commercial fishing community. Shrimpers and crabbers lost or suffered damage to boats and equipment in the storms or from debris in the water after the storms. Infrastructure like docks and ice houses was also damaged. The effects of the storms increased pressure on individual shrimpers already contending with competition from pond-grown imports, lower prices at the dock and higher fuel costs, as well as ongoing loss of spawning grounds to coastal erosion and over-fishing and pollution that affect the quantity and quality of the catch. After the storms, in 2006, the crab population increased, but crabbers have struggled with a scarcity of crabs in 2007 and 2008. Oysters drowned in mud when the 2005 hurricanes inundated the banks. In 2008, oysters succumbed to excess fresh water as the Mississippi River rose due to flooding upstream. Participation in the fishery had already begun to shrink even before the storms. As long ago as 1997, respondents in an LSU Sea Grant study reported that they loved their way of life, but unless market conditions improved, they would discourage their children from following them into the fishery. This broke traditions that in many

families went back generations. Post-disaster, the rising imbalance between expenses and income accelerated shrinkage of the fishing community. The fading of this traditional livelihood and way of life has significant economic and tax consequences for the region, as well as to the state and the nation. Louisiana's commercial fisheries generated \$2.6 billion in annual revenues, supported nearly 30,000 jobs and annually generated \$80.3 million in sales taxes, \$19.2 million in state income tax and \$120.6 million in federal income tax (Southwick Associates). Fisheries have also provided employment for many individuals for whom limited education narrows the range of alternative vocational choices.

Impacts on regional tourism, though less direct, were nearly as devastating. Regional swamp tours and plantation homes dependent on tourists' and convention goers' day trips out of New Orleans suffered when the city's tourism and convention businesses plummeted after the storms. Charter fishing guides lost revenue as pre-booked trips were cancelled. Three years later, activity in this sector of the economy remains well below pre-storm levels. Rising gasoline prices add to pressures on small operators.

Impacts of the 2008 Hurricane Season

Three years after Katrina and Rita, the 2008 hurricane season underscored the South Central region's vulnerability to extreme weather events and complicated ongoing recovery from the 2005 storms. On September 1, Hurricane Gustav made landfall in Terrebonne Parish south of Houma then moved north through Assumption and the River Parishes. Fierce winds toppled trees, often into homes. The winds damaged and ripped away roofs and wrecked destruction on electrical systems. Terrebonne, with its entire electric grid in ruins, suffered a 100% power failure. SCPDC's building, under generator power, became the parish's emergency operations center for a period of two weeks. Assumption Parish was almost as hard hit as Terrebonne. Electric crews, both local and from across the nation, struggled heroically to rebuild the system. Restoration was complicated, especially in areas where transmission lines cross the marsh and poles had gone down in a domino effect. Much of the area was out of power for close to two weeks and in some cases longer. Small municipalities with limited budgets struggled to keep backup generators running. It took a full month to completely restore electrical service to economically critical Port Fourchon. With electric pumps at sewer lift stations unable to operate, raw sewage was released into drinking water sources like Bayou Lafourche, source of drinking water for Assumption, Lafourche and most of Terrebonne Parishes. Uprooted trees also broke water lines. Terrebonne and Assumption were both put under boil-water orders. Authorization for residents and businesses to return was delayed to safeguard public health and safety.

Less than two weeks later, while the region still struggled to pick up the pieces, Hurricane Ike struck. In contrast to Gustav, which was primarily a wind event, this was a "wet" storm so huge that it encompassed most of the western Gulf of Mexico. Ike made landfall in Galveston, Texas on September 13, but storm surge hit coastal areas in the region prior to that, during the night of September 12. Surge of up to nine feet flooded southern Terre-

bonne, Lafourche Parish south of the levee system, St. Charles Parish in low lying areas like Bayou Gauche and the Bayou L'Ourse area of Assumption Parish. Many of these communities, previously inundated by Hurricane Rita, experienced higher water levels than in that storm.

Physical damages are still being assessed. In addition to the lengthy power outage, Port Fourchon had road and beach damage, as well as damage to its small boat harbor. Port tenants also suffered significant damages to their facilities. Terrebonne initially estimated 15,000 structures flooded. Door-to-door surveys indicated 2,500 residences and 75 businesses flooded. Lafourche Parish lost the roof and suffered severe water damage at its Race-land office. Terrebonne Parish opened three burn sites within the parish to handle an estimated half a million cubic yards in vegetative debris. Other parishes had similar experiences. Construction and demolition debris was taken to a landfill outside the parish. Barrier islands which protect the coast were overtopped, with many suffering significant losses.

Long-term impacts on the regional economy are more difficult to quantify. Power outages stopped maritime commerce on the Gulf Intracoastal Waterway, because electric lift bridges could not operate. Minerals Management Service reported that Gustav and Ike destroyed 23 manned offshore energy platforms. As of September 24, 2008, an estimated 62.5% of Gulf of Mexico oil production was shut-in. By October 8, 2008, that number had dropped and approximately 44.8% of oil production was still shut-in, while 38.7% of natural gas production in the Gulf remained shut-in.

A 2004 report by Richardson and Scott considered potential impacts if Port Fourchon could not operate for periods of three and five weeks. In the current shrinking national and global economies, actual impacts are likely to vary from the model. National unemployment stands at over 6% and the price of oil below \$90 a barrel for the first time this year.

Three-Week Disruption	Lost Sales	Lost Earnings	Lost Jobs
USA	\$3,676,100,000	\$1,035,600,000	32,390
Louisiana	\$68,200,000	\$19,900,000	831
Five-Week Disruption			
USA	\$6,148,000,000.	\$1,732,000,000	54,170
Louisiana	\$114,100,000	\$33,200,000	1,389

Previous high oil prices spurred an economic boom and near full employment in the Houma MSA, which includes Lafourche Parish. In the wake of the 2008 storms, an unknown factor is whether the lower price of oil may affect the level of investment as major oil companies and service companies restore damaged infrastructure.

Fisheries again experienced impacts. The LSU Sea Grant program estimated product and infrastructure losses from Gustav and Ike at approximately \$251 million. This is in addition to the

\$581 million fishermen lost only three years ago as a result of Hurricanes Katrina and Rita. As in the 2005 storms, fishermen have had equipment damaged by debris in the water.

In the agricultural sector, sugar cane yields are likely to be affected by the impacts of wind on crops in the field.

Employment Trends

After Rita, 100% of crude oil and 80% of natural gas production in the Gulf of Mexico were shut-in and not producing (Scott). With the bulk of its economy energy-oriented, in production and related services, refining and chemicals, the South Central region experienced a temporary spike of very high unemployment. By June 2006, however, MMS reported only 12.1% of oil and 9.3% of gas production still shut-in (Scott). As the majority of production was restored, unemployment in all but two of the South Central parishes dropped below pre-hurricane levels. Figures for February 2008 showed further declines, which most parishes maintained or bettered in April 2008 (Louisiana Works).

Unemployment Rates Pre- and Post-Katrina and Rita.

	August 2005	Sept. 2005	June 2006	Feb. 2008	April 2008
Assumption	7.5%	15.1%	6.1%	4.3%	4.2%
Lafourche	4.0%	10.0%	3.6%	2.5%	2.4%
St. Charles	4.8%	25.4%	6.1%	3.0%	2.9%
St. James	7.7%	16.9%	7.0%	6.2%	5.4%
St. John the Baptist	6.1%	29.4%	8.8%	4.1%	3.8%
Terrebonne	4.1%	10.1%	3.5%	2.5%	2.6%

Source: Louisiana Works. Louisiana Department of Labor.

The quick turnaround in the Houma MSA (Terrebonne and Lafourche Parishes) reflects the scale and pace of activity in repair and replacement of damaged and destroyed energy infrastructure. The rising demand and price for oil has continued to drive the economy. Port Fourchon, in Lafourche Parish, is the hub of deep-water drilling activity in the Gulf of Mexico. Lafourche and neighboring Terrebonne Parishes are home to numerous oil field service, ship and boat building and repair and fabrication companies that support activity at Fourchon. In 2007, this MSA qualified as the fastest growing in the state (Scott). In the Spring of 2008, both parishes in the MSA had virtual full employment.

In early 2008, the national economy was on the downturn and the price of oil broke the \$100 per barrel mark. The regional economy, exhibiting its usual tendency to go counter to national economic trends, stayed strong. This continued as the price of oil rose to \$112 per barrel, an all time high, in April 2008 (National Public Radio). The following month, the price of oil shattered the previous record, topping \$130 per barrel. As of June 9, 2008, the price had jumped to \$135.71 per barrel. By July 22, 2008, the volatile price had dropped to \$127.96 per barrel, but continued to hover near the \$130 mark (www.oil-price.net). The 2008-2009 LEO projected the energy sector to propel continued growth of about 2.7% a year in the Houma MSA into 2008-09. Forbes

Magazine, in April 2008, ranked the Houma MSA 29th among smaller cities in the U.S. for doing business and developing careers.

The slower rebound of employment in St. Charles and St. John the Baptist probably reflects the two parishes' heavy representation in the chemical industry. This sector is highly sensitive to increases in the cost of natural gas, as well as to lower-priced competition in global markets. Louisiana's chemical industry workforce has also experienced long-term contraction, losing 5,900 jobs since 1998 as price-sensitive firms have closed plants, scaled back operations or moved them overseas to take advantage of lower costs (Scott). The 2005 hurricanes interrupted the natural gas supply and temporarily shut plants down. Nonetheless, by the Spring of 2008, unemployment in both parishes had dropped well below the pre-storm level (Louisiana Works). This was probably at least partly due to the River Parishes traditional strength in waterborne commerce and warehousing activity related to the Port of South Louisiana. In 2006, the Port handled over 51 million short tons in exports (primarily grain—maize, soybeans, animal feeds and wheat) and nearly 72 million short tons in imports (primarily petroleum related commodities—crude oil, chemicals/fertilizers, petrochemicals). The port also handled over 140 million short tons in domestic transshipments from other states to the north along the Mississippi (Port of South Louisiana). The two parishes benefited as well from their close proximity to the New Orleans labor market, where recovery efforts have sparked a construction boom projected to continue at least five years and probably longer. The shortage of housing, which has limited the supply of labor in the city, has opened job opportunities to workers from surrounding areas (Scott).

Assumption and St. James, the region's two rural, non-MSA parishes, have historically experienced the highest unemployment rates. However, as of the Spring of 2008, the active regional economy had reduced unemployment in Assumption by over three points and in St. James by over two points (Louisiana Works). Both parishes benefit from increased shipbuilding and fabrication activity along the river and just across Assumption's borders with St. Mary and Terrebonne Parishes.

Except for the period immediately after the hurricanes, unemployment figures do not include the majority of displaced fishermen. Most are sole proprietors, eligible only for very short-term, emergency unemployment offered to self-employed individuals for periods of less than two weeks immediately after the disasters.

Trends in sugar cane cultivation also affect regional employment, especially in the more rural parishes. Local growers are using a more productive strain of sugar cane which provides larger yields on fewer acres. Cultivation of this strain also requires fewer workers.

Employment Trends Following Gustav and Ike

Unemployment rates for September are not yet available, so the scale of immediate impacts on the regional labor market remains unclear. Figures for a number of months will be necessary to determine longer-term effects on employment. Of special concern is the effect the pause in energy production activity at Port Fourchon and in support services may have on the market. Prior to the storms, the high prices of oil and natural gas kept hot job markets like the Houma MSA at near full employment, with unemployment more than a point below Louisiana’s overall rate and two points below the rest of the nation. Experience after Katrina and Rita indicates the probability of a spike in unemployment just after such major storm events. Following the 2005 storms, the regional labor market came roaring back, with high energy prices sparking high levels of investment in rebuilding damaged and destroyed energy infrastructure. Current national and global economic turmoil, coupled with the impacts of the hurricanes, creates a number of unknowns, chief among them whether oil and natural gas prices will remain high enough to again spur significant investment in repair and replacement of damaged infrastructure.

Post-Disaster Forces Affecting the Regional Economy

Post-disaster factors cited in the five-year CEDS continue to have significant impacts on the regional economy.

Labor Shortage

The region continues to experience an acute shortage of labor, especially in skilled categories. With near full employment, wages spiked in the year after the storms. Since then, wages for some job categories have fallen somewhat in the Houma area. In the New Orleans area, wages remain considerably higher than pre-storm pay scales. This has been a financial boon to individuals, families and local government tax bases. At the same time, the tight labor market could limit the region’s ability to make the most of current and future economic opportunities. The present labor shortage is not just a post-disaster phenomenon. This is a longstanding issue, with roots in the oil bust and recession of the 1980s, when Louisiana lost 148,000 or about 9% of its jobs. Many of those who lost their jobs moved out of state to find work and have never returned. Twenty years later, their children are entering employment in other states and will contribute to a projected increase in the national workforce through 2010. Louisiana, on the other hand, can expect a continued decline in its workforce during the same time period. Out-migration following the 2005 storms further constricted the state’s labor market (Sayre). Gustav and Ike, coming only three years after the 2005 storms, might have spurred further out-migration, but are less likely to do so in the current national economy.

The shortage of workers has been most evident in skilled labor categories critical to the repair and replacement of offshore energy infrastructure. Shipbuilding and fabrication companies with backlogs of work continue to struggle to find enough welders and fabricators to fulfill contracts. Diving companies conducting underwater pipeline repairs report delays due to an extreme shortage of trained and certified divers. Local unemployed people like displaced fishermen often lack the skills to qualify for these

jobs. Companies unable to fill vacancies locally have increased recruitment of “guest workers” from other countries, particularly from Latin America. Visa delays, limited entry quotas and heightened post-September 11 security regulations in the United States’ H-1B visa program often complicate and restrict the pool of foreign workers able to enter the country. These factors probably play a part in the graying of the regional workforce, as higher wages have convinced some older, experienced workers to stay in their jobs beyond retirement age (Scott).

The tables below depict pre- and post-Katrina job vacancy and wage trends in key occupational groups in the Houma and New Orleans Labor Market areas. Data of this type is not available for the region’s two non-MSA parishes, Assumption and St. James. Note that the days that jobs stay vacant shown in the tables are median numbers and so fall midway between the high and low extremes. As noted previously, inability to fill critical jobs quickly still remains a hindrance to local industry. Factors cited by potential employers include 1) inability to find qualified or experienced applicants; 2) inability to find applicants with specific training/skill sets/certifications; 3) shortage of people in the occupation.

Houma Labor Market

Job Vacancy Survey: Houma Labor Market

	Vacancy Rate			Median Days Jobs Vacant	
	'05 Q2 Pre-Katrina	'06 Q2 Post-Katrina	'07 Q2	'06 Q2	Median: '05, '06 & '07 Q2
Construction & Extraction	1.7%	8.4%	4.9%	60	105
Installation, Maintenance & Repair	1.6%	6.7%	7.4%	30	90
Transportation &					
Material Moving	4.7%	2.4%	3.1%	60	120

Source: Louisiana Job Vacancy Survey. Louisiana Department of Labor. 2006, 2007.

Median Hourly Wage: Houma Labor Market

	'05 Q2 Pre-Katrina	'06 Q2 Post-Katrina	Median '05, '06, & '07 Q2
Construction & Extraction	\$11.50	\$14.00	\$12.00
Installation, Maintenance & Repair	\$8.38	\$8.54	\$12.01
Transportation & Material Moving	\$9.48	\$23.08	\$12.01

Source: Louisiana Job Vacancy Survey. Louisiana Department of Labor. 2006, 2007.

St. Charles and St. John the Baptist Parishes are part of the New Orleans MSA. Labor market information for the two must be extracted from aggregate totals for the metropolitan area. This

kind of Labor Market Information is not available for St. James, which is no longer part of the MSA.

New Orleans Labor Market
Job Vacancy Survey: New Orleans Labor Market

	Vacancy Rate		Median Days Jobs Vacant		
	'05 Q2 Pre-Katrina	'06 Q2 Post-Katrina	'07 Q2	'06	Median '05, '06, & '07Q2
Construction & Extraction	6.1%	19.7%	3.3%	270	49
Installation, Maintenance & Repair	7.0%	19.4%	14.0%	240	45
Transportation & Material Moving	4.2%	8.7%	6.2%	180	26

Source: Louisiana Job Vacancy Survey. Louisiana Department of Labor. 2006, 2007.

Median Wages: New Orleans Labor Market

Median Hourly Wage			
	'05 Q2 Pre-Katrina	'06 Q2 Post-Katrina	Median of '05, '06, '07 Q2
Construction & Extraction	\$12	\$9.50	\$14.00
Installation, Maintenance & Repair	\$12.04	\$12.00	\$14.00
Transportation & Material Moving	\$10	\$10	\$12.00

Source: Louisiana Job Vacancy Survey. Louisiana Department of Labor. 2006, 2007.

Recent Louisiana Department of Labor job vacancy surveys showed an average statewide wage increase of 39.6% across six construction-related occupations (LEO. 2008-2009).

Construction Occupations	% Change in Average Wage
Carpenters	70.9%
Electricians	18.7%
Engineers	14.1%
Helpers	35.2%
Plumbers	21.9%
Technicians	41.4%
Total	39.6%

Population Shifts

Accurately quantifying the size and impact of the post-disaster population shifts remains difficult. Much of the increase in the SCPDC district has occurred in communities relatively close to New Orleans and in growth areas like Houma and LaPlace.

Parish Population Trends

	2000 U.S. Census	July 1, 2007	Number Change	% Change
Assumption	23,388	23,112	(276)	-1.18%
Lafourche	89,974	91,443	1,469	+1.63%
St. Charles	48,067	50,374	2,307	+4.80%
St. James	21,414	21,632	218	+1.02%
St. John the Baptist	43,049	46,472	3,423	+7.95%
Terrebonne	104,503	108,419	3,916	+3.75%
District Total	330,395	341,452	+11,057	+17.97%

Louisiana Tech Population Estimates. July 2007; Louisiana Works. 3rd Quarter 2007.

A 2006 Brookings Institute report on population trends showed St. Charles Parish with a 4.1% gain, from 50,203 in 2005 to 52,269. St. John the Baptist Parish had a 5.9% gain, from 45,950 in 2005 to 48,642. Most of that growth occurred in the LaPlace area. In November 2007, the Greater New Orleans Community Data Center issued a population update based on tracking residences actively receiving mail from August 2006 to November 2007. Growth rates for the two SCPDC parishes were very close to those in the Brookings study.

St. Charles & St. John Parishes Residences Actively Receiving Mail

	St. Charles		St. John the Baptist	
	Residences	Percentage	Residences	Percentage
July 2005	14,847	100%	14,555	100%
August '06	15,160	102.1%	14,979	102.9%
Sept. 2006	15,167	102.2%	14,975	102.9%
Oct. 2006	15,212	102.5%	15,045	103.4%
Nov. 2006	15,207	102.4%	15,110	103.8%
Dec. 2006	15,223	102.5%	15,126	103.9%
Jan. 2007	15,292	103.0%	15,202	104.4%
Feb. 2007	15,320	103.2%	15,205	104.5%
March '07	15,393	103.7%	15,290	105.0%
April 2007	15,401	103.7%	15,311	105.2%
May 2007	15,420	103.9%	15,321	105.3%
June 2007	15,456	104.1%	15,368	105.6%
July 2007	15,480	104.3%	15,398	105.8%
August '07	15,501	104.4%	15,408	105.9%
Sept. 2007	15,480	104.3%	15,525	106.7%
Oct. 2007	15,531	104.6%	15,451	106.2%
Nov. 2007	15,539	104.7%	15,470	106.3%

Comparison with other data sources indicates that Brookings growth projections may be less accurate for the Houma MSA. Brookings projected growth of 1.1%, from 106,078 in 2005 to 107,291 in 2006. Estimates based on FEMA individual assistance applications indicate that the Houma area’s population actually ballooned upward by as many as 62,810 people in the first two weeks after Katrina. This put Houma second only to Baton Rouge in numbers of in-state evacuees. While the majority of the additional population later moved on, the area did gain about 3,898 permanent residents (Scott). That represents approximately 4% of the pre-storm population.

Prior to the 2005 storms, Assumption and St. James, the region’s two non-MSA parishes, experienced little or no growth. The 2006 LEO suggested that non-MSA parishes might be at risk of losing both population and jobs in the post-disaster economy. Both parishes, as noted above, have historically higher unemployment rates than the rest of the district. Many Assumption residents commute out of the parish for work. Since the 2005 storms, both parishes have begun to see increases in subdivision development. As land and housing prices soar elsewhere in surrounding areas, the two parishes’ still affordable cost of land and convenient locations for commuting for work in New Orleans and Baton Rouge have attracted the interest of both developers and homebuyers.

Newcomers have had significant impacts on regional communities. Housing prices, though lower than in the New Orleans metropolitan area, have risen. Traffic congestion, housing shortages and higher prices for construction materials have accompanied

the increase building and development. Population growth in St. Charles has outstripped the capacity of the East Bank water plant, forcing the parish to expedite a planned capacity increase. Large industrial and business water users have felt the impact of higher rates.

Bedroom Communities

The loss of more than 200,000 housing units in New Orleans and its environs continues to reverberate through the regional housing market. LaPlace and Houma have become residential, retail and service centers. St. Charles has seen extensive new subdivision development. Assumption and St. James, adjusting to unaccustomed growth, are both exploring potential for adoption of land use controls to maintain community character while accommodating the new residents. Newcomers who work outside the parish can increase demand for services without appreciably adding to the tax base to support those services.

Residential shifts also affect workforce commuting patterns. While post-disaster information is largely anecdotal, it suggests that the current economy may be amplifying regional outbound and inbound commuting trends seen in the 2000 U.S. Census. The table below includes resident workers within each of the regional parishes, as well as workers commuting to other parishes in the region and to parishes outside the region. The second table below depicts commuters coming into the region for work. It includes the same parishes.

Commuting Within Parishes and Outbound to Other Parishes

	Assumption	Lafourche	St. Charles	St. James	St. John	Terrebonne	Ascension	St. Mary	Jefferson	Orleans	E. Baton Rouge
Assumption	3,075	880	46	227	19	269	1,209	1,329	127	62	723
Lafourche	337	23,641	973	421	103	6,999	164	827	1,353	515	202
St. Charles		242	9,621	101	563	144	19	18	7,095	2,435	142
St. James	27	347	642	3,985	859	59	721	29	301	143	
St. John the Baptist		69	2,310	607	7,393	56	308	5	4,310	1,359	284
Terrebonne	25	3,210	104	57	65	33,567	68	1,145	497	403	105
Totals	3,464	28,389	13,696	5,398	9002	41,094	2,489	3,353	13,683	4,917	1,456

Source: Residence County to Workplace County Flows for Louisiana: Sorted by Residence State and County. 2000 U.S. Census.

Commuting Within Parish and Inbound from Other Parishes

	Assumption	Lafourche	St. Charles	St. James	St. John	Terrebonne	Ascension	St. Mary	Jefferson	Orleans	E. Baton Rouge
Assumption	3,075	337		27		27	123	24	15	8	53
Lafourche	880	23,641	242	347	69	3,210	38	175	320	110	40
St. Charles	46	973	9,621	642	2,310	104	224	34	4,055	1,064	213
St. James	227	421	101	3,985	607	57	1,157		227	56	547
St. John the Baptist	19	103	563	859	7,393	65	21	40	971	394	140
Terrebonne	269	6,999	144	59	56	33,567	31	367	363	87	95
Totals	4,516	32,474	10,671	5,919	10,435	37,030	1,594	640	5,951	1,719	1,088

Source: Residence County to Workplace Country Flows for Louisiana: Sorted by Workplace and County. 2000 U.S. Census.

Other long-term trends include workers commuting into the region from other states, such as Mississippi, Texas, Alabama, Arkansas, Florida, Georgia. The region also has residents who work outside the continental United States. Assumption Parish had residents working in Mexico, while Lafourche Parish had residents working in China, India, Mexico, Bolivia, Angola, Egypt. St. Charles Parish had no residents reporting work outside the country, but St. John the Baptist Parish had residents working in the United Kingdom. Terrebonne Parish had residents working in Puerto Rico, the Netherlands, Bahrain, India, Saudi Arabia, Mexico, Honduras, the Netherlands Antilles, Venezuela, Algeria. Residents of a number of parishes described their place of work as “at sea.”

Business Relocation

Data on business relocations has been even more difficult to obtain than information on population and workforce shifts. Anecdotal evidence indicates that the 2005 storms augmented some already existing trends. New Orleans businesses involved in freight and warehousing had already begun moving to industrial and commercial parks along Airline Highway in St. Charles Parish to avoid traffic congestion. Three years after Katrina, the St. Charles Department of Economic Development reports the parks continue to have 80-90% occupancy rates. Katrina also prompted relocation of a number of city-based food production companies to locations like Globalplex at the Port of South Louisiana.

Post-Disaster Uncertainties

The 2007 CEDS noted that the “wild card” remained the chance that a catastrophic storm may again strike the area. The 2008 storms made that possibility a reality. The most recent storms also further accelerated the pace of ongoing coastal land loss and subsidence the 2005 storms had quickened. These conditions make the region increasingly vulnerable to storm surge from even smaller weather events. This increases risks to critical infrastructure like Port Fourchon, heavily impacted in 2008, and the Gulf Intracoastal Waterway (GIWW). It also threatens the continuing prosperity of the Houma MSA, also impacted in 2008. The rising cost of natural gas could affect activity at major chemical plants in the River Parishes (LEO. 2008-2009). Gustav and Ike renewed calls for increased federal funding for coastal restoration. Experts say swift action is critical, while the islands and headlands still have platforms to build on. Land loss is happening so quickly that even the current situation is so fluid designs must be continuously modified. Every delay allows further land loss which daily makes restoration more expensive. The current situation is so fluid that designs must be continuously modified.

Insurance continues to be an even more critical issue after the 2008 hurricanes. Private insurers have substantially raised homeowner and business insurance premiums, cancelled policies in effect less than three years and stopped writing new policies in coastal areas. At present, many property owners’ only option is the Louisiana Citizen’s Plan, the state’s higher-premium insurer of last resort. Developments indicating some potential for gradual easing of the situation and the return of private insurers to Louisiana markets were stopped by the 2008 storms. Consistent enforce-

ment of the International Building Codes Louisiana adopted in the wake of the 2005 hurricanes continues to be increasingly critical to public health and safety. The South Central region benefits from a regional approach to code enforcement, with five of the member parishes and six of the municipalities participating in the South Central Regional Construction Code Council. This program, developed and administered by SCPDC, has in its first year of operation also significantly reduced inspection costs to property owners (South Central Regional Construction Code Council, 2007). A bill passed by the U.S. House of Representatives to amend the National Flood Insurance Program to allow property owners to purchase wind and flood coverage in a single policy has not moved forward in the U.S. Senate. Hurricanes Gustav and Ike, combined with tight national markets, are likely to further delay any possible return of private insurers to the Louisiana market.

Other uncertainties that affect the regional economy include the rising cost of fuel. This is the downside to the higher price of gas that has helped keep the region’s energy industry strong. Ripple effects have tightened operating margins for businesses throughout the region. Companies like Baumer Foods, maker of Crystal Hot Sauce and other sauces in St. John the Baptist Parish, feel the pinch of higher prices for raw materials, for overhead and for shipping finished product. Some companies keep costs down by recycling. Zapp’s Potato Chips in St. James Parish uses a proprietary filtering system that allows reuse of peanut oil. This has helped the company weather staggering increases in the price of this key commodity for its frying process (New Orleans Times Picayune). The cost of fuel increases the cost of commuting and could thus have long-term impacts on worker mobility and could thus further tighten the regional labor market.

Other Forces Affecting the Regional Economy

Recovery Assistance

Katrina and Rita changed the region's physical and economic landscape. Funds from insurance claims, the infusion of federal dollars for rebuilding public and private infrastructure and a package of federal tax incentives have continued the process and sparked an unprecedented construction boom. A report titled *The Gulf Coast: Economic Recovery Two Years After the Hurricanes* contains a partial list of recovery assistance to Louisiana (U.S. Department of Commerce).

While the bulk of this funding has gone to New Orleans, residents of the region have benefited from employment opportunities in the city and from regional business and industry involvement in supplying goods and services for projects in the city.

- Approximately \$6 billion in U.S. Army Corps of Engineers levee construction projects, plus an additional \$1.3 billion allocated to the Corps for Louisiana projects:
 - As of July 2007, the Corps had expended about \$1.6 billion of the original allocation.
 - The additional \$1.3 billion was allotted to Louisiana from the \$1.4 billion allocated to the Corps. As of July 2007, none of those funds had been obligated.
- \$5.4 billion in Federal Emergency Management Agency (FEMA) public assistance (PA) funds: As of November 2007, a total of \$2.8 billion had been disbursed to public entities and the remaining \$2.6 billion was being held by the state for disbursement. P.A. funds can be used for
 - education recovery (\$1.3 billion obligated of the \$1.7 billion needed);
 - healthcare infrastructure (\$442 million of the estimated \$503 million needed);
 - utilities and transportation infrastructure such as roads, bridges, ports, water systems and electrical utilities (\$594 million obligated)—in the region, this included repair of wind damage from Hurricane Katrina at economically critical Port Fourchon;
 - public spaces such as parks, and cultural and historic centers. The \$166 million obligated includes \$130 million for the Louisiana Superdome. The state is eligible for a total of \$184 million in this category;
 - public safety and criminal justice--\$286 million of the estimated \$327 million needed;
 - The "other" category included replacement or repair of other public structures like government buildings and other public services, as well as debris removal, with \$2.6 billion obligated in this category.
- \$10.4 billion in Community Development Block Grant (CDBG) funds: These funds were intended to help those who lost their homes, to restore needed infrastructure, and to promote long-term recovery. CDBG funds were disbursed through the Louisiana Recovery Authority and the Office of Community Development and administered by departments of state government. CDBG-funded programs include
 - **Road Home**—SCPDC hosted an intake center from the program's inception in 2006 through mid-2008.
 - **Business Recovery Grant and Loan Program**—SCPDC, under contract with the Louisiana Economic Development Department, was an intermediary in this program, primarily serving businesses in the region's four eligible parishes (Lafourche, St. Charles, St. John the Baptist and Terrebonne). Assumption and St. James Parishes, not designated as impacted by FEMA, were not eligible. Phase I of the grant and loan program kicked off in January 2007 and was winding down in late May 2008. The largest percentage of Phase I funds went to assist members of the fishing community. Phase II of the grant and loan program began with intake of applications in early June 2008.
 - **Tourism Marketing Assistance**—The Louisiana Department of Culture, Recreation and Tourism coordinated aid to local tourist commissions. The Lafourche Parish Tourist Commission received \$60,000 for a joint tourism marketing project with the Houma-Terrebonne Parish Tourist Commission. The River Parishes Convention, Tourist and Visitors Commission received \$150,000 for marketing of its parishes.
 - **Fisheries Infrastructure Recovery**—SCPDC developed the proposal submitted to the LRA, which became the basis for the Action Plan Amendment for this program. The Louisiana Association of Planning and Development Districts (LAPDD) and the Louisiana Seafood Promotion and Marketing Board funded development of the proposal. In March 2008, the LRA announced the awarding of \$19 million in grants for projects to repair/replace facilities damaged or destroyed by the storms, such as docks, ice plants, cold storage, processing and safe harbor locations at various coastal locations.
- An unspecified percentage of \$6.9 billion in approved Small Business Administration (SBA) loans: SBA received about 422,000 loan applications for the Gulf Coast, 364,000 from homeowners and 58,000 from businesses. As of December 2007, about 120,000 approved loans had either been fully or partially disbursed.

- **Insurance Claims:** The Insurance Information Institute has designated the combination of Katrina and Rita the costliest natural disaster in history. Property owners in six states filed a total of \$40.6 billion in private insurance claims. The losses prompted decisions by many private insurers and the re-insurers who handle much of the risk to pull out of the state insurance market. The claims total does not include the \$15.8 billion in claims under the National Flood Insurance Program (NFIP) or the \$2.5 billion in claims for insured damage to energy facilities in the Gulf. Louisiana alone accounted for \$25.3 billion in private insurance claims. As of November 2007, insurance companies had settled **claims filed by 688,000 Louisiana homeowners for a total of \$10.8 billion** (The Gulf Coast: Economic Recovery Two Years after the Hurricanes. Economics and Statistics Administration. U.S. Department of Commerce. December 2007). A significant number of homeowner claims were classified as due to “act of God” flooding and not paid.
- **Tax Incentives:** Louisiana businesses in parishes impacted by the storms had access to **preferential tax incentives through initiatives under the Gulf Opportunity (GO) Zone Act of 2005**. The act, now extended through 2010, includes tax-exempt bond authority for both residential and non-residential property in eligible areas. The act also expanded the low-income housing credit and allowed the expensing of demolition and clean-up costs. All six SCPDC parishes had GO Zone status. Terrebonne and Lafourche qualified in both the Katrina and Rita Zones. Assumption, St. Charles, St. James and St. John the Baptist qualified in the Katrina Zone. **The total value of the preferential tax provisions was estimated at \$16 billion.**

As of September 2008, GO Zone benefits were no longer available, except for bonding and depreciable property provisions in eligible areas.

Additional recovery assistance not itemized in the Department of Commerce report has included:
- **Federal Emergency Management Agency (FEMA ESF-14) Long-Term Community Recovery Planning**—Immediately after the storms, FEMA recruited and placed multi-disciplinary teams of professional planners, engineers, etc. in the most devastated parishes. The teams, which included both local hires and professionals drawn from across the country, worked with local stakeholders and conducted community meetings to gather local input in identifying projects for possible FEMA funding to help make communities less vulnerable to future major weather events. Individual parish plans were incorporated into the “Louisiana Speaks Regional Plan,” released in May 2007. In the SCPDC region, Lafourche and St. Charles Parishes had full teams, while Terrebonne had a smaller, “self-help” program.
- **Fisheries Assistance:** Several recovery programs addressed the special needs of the devastated fishing community. SCPDC first administered a privately funded fisheries assistance program and was then requested by the Louisiana Department of Wildlife and Fisheries (LDWF) to assist in administering a number of federally funded assistance programs.
 - **\$250,000 “Back to the Dock” Program**, funded by the Shell Oil Company, made \$5,000 grants to help 45 fishermen along the Louisiana coast to make repairs and prepare for fishing season. The grant also enabled a direct mailing to notify all Louisiana commercial fishing license holders of upcoming assistance programs for which they might qualify. The data base developed from the over 800 applications received was used to identify potential participants in subsequent assistance programs.
 - **\$15.9 million Private Oyster Lease Rehabilitation (POLR) program, funded through the National Oceanic and Atmospheric Administration (NOAA)**—This program began in May 2007 and is ongoing through 2010. SCPDC, under contract with the Louisiana Department of Wildlife and Fisheries and through sub-contracts with a number of other state planning districts, organized outreach meetings and handled required paperwork and computer processing of requests for reimbursement to nearly 700 leaseholders.
 - **\$41.2 million Fisheries Assistance Program, funded through NOAA with a supplemental appropriation under the Magnuson Stevens Act**—This program began in May 2008 and ends in 2009. SCPDC, under contract with the Louisiana Department of Wildlife and Fisheries and through sub-contracts with the state’s seven other planning districts, organized informational meetings and began handling required paperwork and computer processing of certification of eligibility for assistance to over 8,000 commercial fishermen, dealers and boat owners. A later phase of the program will assist licensed charter fishing guides.

Impacts of Recovery Assistance

As with the New Orleans area economy, the combination of unemployment due to the labor shortage, the stimulus of both public and private recovery spending for construction have combined with higher energy prices to help keep the regional economy “somewhat insulated from the national economic downturn.” It seems likely that the pace of construction will slow as federal assistance is expended (Metropolitan Report: Economic Indicators for the New Orleans Area. Division of Business and Economic Research, University of New Orleans. April 2008).

Anecdotal reports indicate that, following significant payouts after the storms, private insurers have been reluctant to provide coverage for construction and placement of some offshore oil rigs. This could stall or cancel some projects and affect economic prospects in the Houma MSA.

After Federal Funding

A proposal for an additional \$2.9 billion in federal recovery funding for Louisiana, included in an emergency war supplemental bill, seems likely to be cut. Funding would have included assistance to reduce the state share of upgrading levees to 100-year flood protection levels from \$1.5 billion to \$1.3 billion and allowing the state 30 years in which to pay its share, rather than the original three years. The Louisiana Congressional delegation has promised to continue to press for additional funding. As noted above, it seems likely that, without federal assistance, the pace of construction is likely slow and critical protection projects will be delayed.

Recovery Assistance After Gustav and Ike

The Louisiana congressional delegation is pressing for federal assistance to aid recovery from the 2008 storms. Reports indicate there will likely be an additional allocation of aid for fishermen, who were again hard hit. Funds for the fishery would be shared with Texas. Exact dollar amounts and details of any possible assistance programs are not yet known.

In the wake of the 2008 hurricane season, EDA made a grant of \$400,000 to the Louisiana Association of Planning and Development Districts (LAPDD) to help individual districts improve planning for disaster response within their districts. SCPDC will aid its member governments in their emergency planning and will also enhance its own plans and state of readiness to respond to future disasters. This includes any future disasters that may require evacuation of the entire agency.

Goals and Objectives

In 2001, the South Central region established six goals that remain, with slight adjustments, generally applicable today. This year's CEDS adds a seventh goal regarding pre-planning of regional disaster response. These goals link the regional vision to the state's Vision 2020 goals. The goals and the objectives intended to advance each of them are designed to help the region maximize its strengths, capitalize on its opportunities and resolve any problems. The SCPDC goals and objectives are as follows:

- **Goal One:** Improve the region's public infrastructure in order to support and sustain a viable economy and environment.
 - Objective 1: Improve road infrastructure and capacity.
 - Objective 2: Improve water and wastewater treatment and collection capacities.
 - Objective 3: Improve public facilities and services.
 - Objective 4: Continue infrastructure improvements at area ports and airports.
 - Objective 5: Improve flood protection and drainage.
- **Goal Two:** Create and retain quality jobs and foster a more diversified economy
 - Objective 1: Work within existing industry sectors to identify workforce development needs
 - Objective 2: Provide technical support and infrastructure necessary to support start up, relocation and recruitment of businesses.
 - Objective 3: Support research and development in new and emerging industry sectors.
 - Objective 4: Promote regional coordination among various public and human resource transportation providers to ensure residents of the region have access to work and necessary services.
- **Goal Three:** Improve the region's overall capacity to make efficient land use decisions
 - Objective 1: Develop and/or update Parish Comprehensive Plans
 - Objective 2: Develop and implement other programs that enhance existing land uses and encourage development near existing business centers or in areas identified by local governments.
 - Objective 3: Promote development practices that reduce vulnerability to severe weather events.
 - Objective 4: Promote mitigation efforts such as elevating structures in flood-prone areas to reduce risk.
 - Objective 5: Promote use of pervious paving to reduce runoff that can contribute to flood risk.
- **Goal Four:** Improve the region's overall capacity to make economic development decisions
 - Objective 1: Identify potential funding sources that will facilitate various types of business development and enhance economic development programs.
- Objective 2: Support efforts that sustain regional tourism
- Objective 3: Continue to explore opportunities to further new and emerging industry sectors
- Objective 4: Improve regional knowledge of sources of small business assistance.
- **Goal Five:** Improve the fiscal capacity of local government to make the region financially attractive for economic development
 - Objective 1: Identify and educate the public about business incentives available to the region
 - Objective 2: Promote uniform enforcement of construction codes to bring private insurers back into the regional property insurance market
 - Objective 3: Expand and enhance financial incentive programs offered to resident and new businesses.
 - Objective 4: Enhance and build leadership capacity in small communities to foster revitalization and sustainability.
 - Objective 5: Cooperate and assist in the formation of a community foundation to aid community development projects in the Houma-Thibodaux area, currently the only MSA in the state without such a foundation.
- **Goal Six:** Protect and conserve the region's natural resources and promote more equitable use of these resources for business and recreation
 - Objective 1: Conserve the available resources for future generations
 - Objective 2: Advance implementation of barrier island, wetland and levee projects to protect communities and regional economic interests
 - Objective 3: Recognize open land, marsh, wetlands and barrier islands as critical infrastructure providing friction to help reduce the region's vulnerability to high-water events.
 - Objective 4: Identify and promote eco-tourism opportunities.
- **Goal Seven:** Pre-Plan to improve the region's emergency operations and recovery systems.
 - Objective 1: Develop quick recovery plan and use it as a marketing asset for the region.
 - Objective 2: Establish uniform re-entry policies and inter-governmental agreements to allow essential personnel and businesses to cross through neighboring parishes as necessary.
 - Objective 3: Develop alternate power sources for critical public infrastructure, businesses and public services.
 - Objective 4: Improve emergency operations center communications during emergency situations to provide business with critical, up-to-date information.

Regional Needs and Environmental Assessment

This section updates and expands on the analysis conducted for the five-year CEDS. The analysis incorporates both economic needs and environmental concerns. The regional economy is based on the abundant natural resources and natural and manmade waterways. An effective regional development strategy should reflect the close interaction among the natural and built environments, local communities and regional economic activity. The strategy should also address the urgent need to reduce the vulnerability of communities and economic interests vital to the state and the nation, as well as the region.

Strengths

- Abundant natural resources: oil and gas, fisheries, wildlife;
- The region supplies around 30% of the nation's domestic oil production and receives approximately 12% of imported oil;
- Navigable waterways: Mississippi River, Gulf Intracoastal Waterway, Bayou Lafourche, Gulf of Mexico, etc.;
 - Regional ports:
 - Port Fourchon, hub of deep-water drilling in the Gulf;
 - Port of South Louisiana, one of the busiest in the world, transshipping grain for export and petroleum products for import, as well as domestic freight from Midwestern states to the north along the river;
 - Louisiana Offshore Oil Port (LOOP), the only super-tanker port in the Gulf, accounts for around 13% of the nation's imported oil;
 - Port of Terrebonne is growing as a center of ship and boat building and rig fabrication for the offshore energy industry;
- Extensive pipeline systems transmit raw materials (oil and natural gas) from the coast to refineries and chemical processing plants in the River Parishes;
- Airports: Houma Regional Airport; St. John the Baptist Parish Airport; South Lafourche Leonard J. Miller, Jr. Airport; Thibodaux Municipal Airport;
- Skilled workforces in both the energy and petrochemical industries, with opportunities for cross training between the two major industries;
- Labor force one of the nation's most productive on a per capita basis—skilled regional metal fabricators and machinists critical to implementation of complex recovery projects like rebuilding of the Shell Mars deep-water platform;
- L.E. Fletcher Technical and Community College, one of two such institutions in the state, offers academic programs, as well as job readiness and skill development;
- Vocational and Technical Schools in Thibodaux, Galliano and Reserve focus on skill development, matching potential employees to employers and offering employers customized training;
- Private vocational and technical training institutions include ITT Technical Institute, Greater New Orleans Industrial Education Center and Associated Builders and Contractors in St. Charles Parish;
- Inventory of available land well suited for development;
- Access to Interstate 10 in the River Parishes;
- Access to four-lane, interstate grade U.S. Hwy. 90 (future I-49 Corridor) in Bayou Parishes and St. Charles;
- Strong cultural identity;
- Strong sense of place (history, architecture, ethnic identity);
- Strong arts programs;
- Strong entrepreneurial spirit—the region has numerous homegrown companies, such as Bollinger Shipyard, Edison Chouest-North American Shipbuilders; Gulf Island and Dolphin Fabrication, large maintenance companies in the River Parishes.
- Center of inventiveness—offshore drilling techniques originally developed in the South Central region are used worldwide; the region has the highest number of patents in the state.
- Regional Revolving Loan program provides gap financing to help small local businesses grow and succeed;
- Growing retail centers in Houma and LaPlace;
- Medical Centers with strong national reputations in cardiac care and surgery and trauma care;
- Open space and outdoor recreational opportunities in fishing, hunting, boating and bird watching—bird watching events like the annual Grand Isle Birding Pilgrimage bring thousands visitors to the area and could be expanded to encourage eco-tourism development.

Weaknesses

- Due to the lack of hurricane protection levee system, the region remains vulnerable to storm surge.
- Need to recognize severe weather events as a fact of life for the region and to develop pre-planning for quick recovery that includes redundant, backup alternate power sources like wired-in generators.
- Not enough qualified people to fill available jobs in regional business and industry;
- General low level of educational attainment limits many regional residents to unskilled or semi-skilled employment;
- Shortage of skilled workers limits capacity in the shipbuilding industry;
- Skilled workforce often has industry specific skills;
- H-1B “guest worker” visa delays, quota limits and security regulations constrain regional employers' ability to import skilled labor;
- Economy remains largely undiversified and heavily reliant on

- oil and gas and petrochemical sectors;
- Need more cross training between offshore oil and gas and onshore petrochemical and other industries;
 - Need to develop more certification programs like those in the construction and maritime trades;
 - Need to focus training and education programs to fit the region's current strengths and potential for future development;
 - Need to develop programs to start raising young people's awareness of training, academic and vocational options at an earlier age;
 - Water infrastructure in some areas has inadequate capacity;
 - Many roadways in need of upgrading and repair and capacity increases—Louisiana Highway 1, the critical oil and gas/energy corridor along the coast, is currently the sole means of land access to economically critical Port Fourchon and Grand Isle.
 - Pipelines connect to chemical plants along the Mississippi River.
 - Terrebonne Parish and the West Bank of the River Parishes lack hurricane protection levees ;
 - Lack of rail access in the Bayou Region and on the West Bank in the River Region increases freight costs for industrial and business users;
 - Lack of adequate drainage systems and levees for flood and storm protection throughout the region;
 - Lack of public transit in some parts of the region;
 - Lack of an effective regional marketing strategy for identifying appropriate target businesses to fill gaps in existing industrial sectors and expand opportunities for diversification in emerging sectors with potential for growth;
 - Limited industrial/business park space or building and sites available for development can limit opportunities to attract relocating businesses.
 - Lack of North-South Transportation Corridor.

Opportunities

- Population growth and new development;
- Emergence of Houma and LaPlace as residential and commercial centers;
- New petroleum finds in Gulf deep offshore waters;
- Skills developed in petroleum and petrochemical industry could transfer to the environmental, food technologies, health care and safety fields to help diversify the regional economy;
- Reintroducing the Mississippi River into Bayou Lafourche would increase water flow and help improve water quality in source of drinking water for all or part of four parishes;
- Reintroducing the Mississippi River into Bayou Lafourche would also help reduce saltwater intrusion in this key source of drinking water;
- Foster collaboration on research to advance technological development by connecting Nicholls State University and regional ports, airports and hospitals to the Louisiana Optical Network Initiative (LONI);
- Proposed \$17.75 million Gulf Coast Institute for Emergency Preparedness and Response proposed for L.E. Fletcher as part of the Louisiana Community and Technical College System "Centers of Excellence" program would train first responders and emergency preparedness officers and develop innovative program related to disaster planning, response and recovery;
- Proposed \$21.25 million Marine Manufacturing Technology Institute "Center of Excellence" in neighboring Southeast Louisiana would deliver state-of-the-art training and education to Louisiana's \$3.9 billion shipbuilding industry, including major companies like Bollinger, North American Shipbuilders/Edison Chouest which are headquartered in the region, as well as to the numerous smaller ship and boat yards;
- Cooperate with the state's Coastal Protection and Restoration Authority, state and private university resources and the Community and Technical College system to position the region as a laboratory, training center and possible additional "Center of Excellence" for state-of-the-art coastal restoration technologies;
- Explore potential for a possible additional "Center of Excellence" in state-of-the-art logistical and cargo-handling technologies to be located in the River Parishes;
- Rising demand for alternative fuels which could use soybeans, sugar cane and other regional agricultural products and build on existing workforce skills and infrastructure;
- Proposed small business incubator programs in Thibodaux, Terrebonne and St. Charles Parishes;
- Repayments of loans under the Business Recovery Grant and Loan Program will expand regional Revolving Loan Fund (RLF) capacity to provide gap financing for small businesses in the region;
- Proposed passenger rail service between New Orleans and Baton Rouge, with a potential stop in the River Region;
- Possible channel connections between Port Fourchon and the Port of Terrebonne;
- The planned River Parishes Transit Authority (RPTA) will increase access to jobs for workers in St. Charles, St. James and St. John the Baptist Parishes;
- The Thibodaux area is exploring potential for a transit system to serve northern Lafourche Parish;
- Completing Interstate 49 and the North/South Corridor to improve highway connections for all parts of the region;
- Combine state focus on cultural economy with eco-tourism opportunities for older visitors looking for leisure travel and areas suitable for retirement;
- Continue implementation of the Bayou Lafourche Corridor Plan to enhance community assets and provide a working model

- for developing cultural and eco-tourism resources throughout the region;
- Capitalize on existing strengths in cardiac care and surgery and trauma care to position the region as a medical hub for Central and South American patients;
 - Continue to develop a regional focus and cooperative endeavors among district communities;
 - Uniform enforcement of building codes by the Regional Construction Code Council has potential to gradually convince private insurers to return to regional insurance market;
 - St. Charles Parish Public School System's Satellite Center in Luling;
 - St. James Parish mobile classroom can bring targeted training programs to disadvantaged communities;
 - Increased world demand for perique tobacco, used in premium tobacco blends and grown exclusively in Grand Point in St. James Parish.
- Rising utility costs due to the increasing cost of natural gas;
 - Insurance companies reluctance to insure offshore rigs could slow economic activity in the Houma MSA;
 - Lack of adequate funding to provide social and educational services to the influx of workers from other parts of the United States and other countries;
 - Lack of mental health services due to closure of the regional facility in Houma, as well as facilities in New Orleans;
 - Shrinkage of the commercial fishing community and change in sugar cane production could leave exiting fishermen and farm workers with few occupational alternatives and the region with a significant the population lacking employable skills.

Threats

- Ongoing coastal erosion and increased vulnerability to flooding in even small weather events threaten communities and critical economic interests and infrastructure like Port Fourchon and pipelines linking to industry in the River Parishes;
- Land loss contributes to saltwater intrusion, which affects the quality of drinking water, increases the cost of water treatment and threatens marsh and wetlands;
- Public health issues due to lack of comprehensive sewerage in much of the region and consequent discharge of inadequately treated wastewater into potable water supplies, fishery grounds and recreational waters;
- The region lacks the financial resources and funding to adequately maintain infrastructure and accomplish critical protective measures;
- Delays at the federal level and environmental conflicts have slowed and may block implementation of the reintroduction of the Mississippi to Bayou Lafourche and of flood protection projects like Morganza to the Gulf and Donaldsonville to the Gulf;
- Changes in federal air quality standards could put the region into non-attainment, complicate the securing of chemical plant operating permits and reduce advantages the region previously had over other Gulf Coast locations like Houston;
- Without deepening and installation of flood gates, the Houma Navigation Canal lacks the capacity to accommodate larger offshore structures and will continue to increase surrounding areas' vulnerability to flooding due to storm surge;
- Rising insurance costs and the exit of many private insurers from the regional market;
- Increasing construction costs;
- Rising housing costs;

Regional Industry Sectors

SCPDC's sector-based economic development strategy can become another regional strength by offering potential to expand the region's range of opportunities. This approach aligns with the Louisiana Economic Development (LED) report *Bayou Industry Cluster Analysis and Recommendations* (2005) and the Metro-Vision report *Power of Partnerships: Sectors and Collaborative Economic Development in Southeast Louisiana* (2004). As stated in the first report, government cannot make sectors happen, but it can recognize sectors that are developing and provide support to help them become successful and competitive.

The regional economy remains highly dependent on the energy and petrochemical industries. The region continues to have significant potential for additional growth in its existing oil and gas; petrochemical; maritime; transportation, logistics and cargo-handling; and shipbuilding industries. Predictions suggest that demand for oil and natural gas could keep prospects for the energy sector strong for as long as the next 20 to 30 years (Whittaker Associates, 2008). The region also has, as detailed below, significant potential related to the development of alternative fuels (Tamerica Management Company, 2007).

The sector strategy builds on the region's current economic base while encouraging development in emerging sectors with growth potential. This approach reflects hard lessons learned in the 1980s oil bust. Mono-industry economies are vulnerable to national and global market forces that can change the economic picture very quickly, as current worldwide economic turmoil indicates. With change coming at an ever faster rate, the region can no longer wait for market impacts before acting. The 2006 Louisiana Economic Outlook noted that the energy industry has already learned to reduce costs and run leaner in down markets. A more diverse economy would further expand the region's range of options for maintaining its prosperity, sustainability and resilience.

Diversifying the economy remains a challenge. In prosperous times like the present, the region has the resources, but businesses have insufficient time and little reason to change. In the current tight labor market, core industry employers may view diversification as increasing competition for the already limited pool of workers. In less prosperous times like the 1980s, businesses may have time and reason to change, but may lack the resources. Experience in the 1980s indicated that businesses attempting to diversify often find it difficult to discriminate between prospects that make sense for the area and have solid potential for success and those that don't fit as well and are less likely to generate a return on investment. A sector-based approach can allow a degree of pre-planning, to be implemented as needed. Such a strategy can thus serve as a kind of compass to help the region reorient itself to changing market conditions and opportunities.

The South Central region possesses an array of assets to aid diversification. This region has a long history of innovation in major industries and entrepreneurship in small businesses. As noted previously, the region leads the state in number of patents. The region has been a leader in developing and manufacturing specialized machinery and equipment for the energy, agricultural and seafood industries. Linkages to the Louisiana Optical

Network Initiative (LONI) can help facilitate access to university-based expertise to expedite development and application of the next and future generations of regionally-developed technologies and products. Proposed "Centers of Excellence" in emergency preparedness at L.E. Fletcher Community and Technical College and in marine manufacturing in the neighboring New Orleans area can help enhance workforce skills in targeted sectors. Linking the two training programs and adding coastal restoration technologies would allow cross-training, with skills transferable among the sectors. Coordination among related sectors can also help enhance global marketing of regional services and expertise by companies based in the region. Again, this approach may be seen by current employers as increasing competition for scarce labor. However, it could, in any future economic downturn, provide the region with a "safety valve" to even out impacts on the regional economy.

Moving into the future, the region will gain from significant expansion of the SCPDC Revolving Loan Fund. Repayments of recovery loans will add an infusion of new capital to the RLF over the next five to seven years. This comes at a very opportune time. Insurance issues continue to limit regional small businesses' access to private capital. RLF participation in loans with regional banks will benefit both local businesses and financial institutions. It is anticipated that, over time, the South Central Regional Construction Code Council's consistent enforcement of building codes will encourage private insurers to return to the regional insurance market and thus relieve some of the pressure in capital markets.

Current prospects for emerging sectors identified in SCPDC's five-year CEDS are reviewed below.

Environmental and Safety Technology

The South Central region continues to possess competitive advantages based on practical, hands-on experience in oil-spill cleanup, remediation and mitigation; in offshore safety; in chemical plant safety; and in marsh, wetland and coastal restoration technologies. The threat posed by Louisiana's coastal erosion and land loss has spurred development of state-of-the-art restoration methods in dredging and targeted placement of sediments and sand. Such skills and knowledge could become highly exportable as sea-level rise threatens worldwide. Linking Nicholls State University and all regional ports, airports and hospitals to the Louisiana Optical Network Initiative (LONI) system would help facilitate partnerships for technology transfer. The "Center of Excellence" in emergency preparedness and response proposed for Fletcher Community and Technical College would build on and enhance existing knowledge and skills gained through experience in dealing with both extreme weather events and other critical situations. Adding environmental and general safety technologies to the program would allow "best practices" training of a highly versatile workforce. The region also has significant potential for growth in the treatment, recovery and reuse of industrial waste, especially toxic waste materials. Proprietary processes like the one Zapp's Potato Chips uses to filter and reuse peanut oil may have potential to become additional profit centers for regional companies. Opportunities in safety technologies seem likely to grow as government regulations and insurers require more rigorous

emergency planning, risk reduction and damage mitigation. ISO (International Organization for Standardization) 1400 environmental management certification could make regional companies more competitive. Less skilled members of the workforce could find employment in activities like growing plants and planting vegetative cover in marsh, wetlands and barrier island restoration projects.

Food Technologies

The region's competitive advantages include knowledge of the food industry and established national distribution networks, especially for seafood products like shrimp, crabmeat and oysters. The region has homegrown companies like Zapp's Potato Chips in St. James Parish and Mam Paul's, maker of Cajun packaged food mixes in St. Charles. After the 2005 storms, companies like Baumer Foods (Crystal Hot Sauce) and NATCO (a commercial meat supplier) relocated from New Orleans to Globalplex at the Port of South Louisiana (St. John the Baptist Parish). Shrimpers in Terrebonne and Lafourche Parishes benefit from a business model that improves quality control by freezing at sea and yields higher prices by selling directly under contracts with local and regional supermarket chains. Resources like the Louisiana Seafood Promotion and Marketing Board, the Louisiana Sea Grant program and the LSU AgCenter provide technical assistance in upgrading quality assurance. The John Folse Culinary Institute at Nicholls State University could become a resource for testing in the development and commercialization of marketable products. The Seafood Promotion and Marketing Board and the non-profit Market Umbrella's White Boot Brigade will continue to assist with marketing contacts. The region also has potential in processing Louisiana specialties like sausage, boudin and spices. Many local stores already package their own lines of products on a small scale. There could be potential, as well, in value-added agriculture in growing specialty vegetables. This cluster could also attract support companies that provide auxiliary products like food packaging (Whittaker Associates, 2008).

Cultural and Eco-Tourism

Three years after the 2005 hurricanes, this sector continues to face significant challenges, but it also exhibits significant potential for growth. The region's unique marine, marshland, swamp, upland and lowland wooded habitats, wildlife and birds remain strong competitive advantages. The region also has an extensive inventory of historic structures. Though pressed by the post-disaster drop in tourism and the rising price of fuel, the network of tour guides, swamp tours, charter fishing guides, bed & breakfast lodgings, and plantation homes remains relatively intact. Data indicate great potential for growth. The U.S. ranks first in the world in international tourist receipts and third in international tourist arrivals. Over 55 million travelers in the U.S. are classified as "geo-tourists," interested in nature, culture and heritage. Over 118 million adult travelers (80% of the total) have included an historic or cultural activity while traveling. Many visitors look for "unique and culturally authentic travel experiences that protect and preserve the ecological and cultural environment." Over half of travelers look for opportunities to learn about the customs,

geography and culture of the places they visit (International Ecotourism Society). Parish tourist commissions and the state Tourism Office can assist in developing this cluster by facilitating cooperative marketing packages to make the most of individual operators' resources. The Bayou Lafourche Corridor Plan (2007), funded through a special Congressional appropriation, identifies assets suitable for enhancement and provides a detailed model for cultural and eco-tourism development in the region. Elements of the plan already being implemented in Lafourche Parish include the Center for the Traditional Louisiana Wooden Boat in Lockport and the Central Market, currently in the design phase, to be located near the Lafourche Tourist Welcome Center at the junction of LA 1 and U.S. 90 in Raceland. Organizations like the federally chartered Barataria-Terrebonne National Estuary Program (BTNEP), the Louisiana Universities Marine Consortium (LUMCON) and the Louisiana Nature Conservancy, which already serve as first points of contact for many visitors, can help develop education-tourism opportunities. Such programs could also help build a critical mass of awareness and support for coastal restoration in the rest of the country and around the world. An initial target market might be individuals and groups which have volunteered in rebuilding efforts in the region, in New Orleans and throughout the Gulf Coast. Travel packages based on regional assets could focus on coastal and marine ecotourism; cultural heritage tourism; hands-on volunteer experiences in restoration projects; visits to Port Fourchon and an offshore oil rig; the Grand Isle Birding Pilgrimage, etc.

Healthcare

The region continues to benefit from significant competitive advantages. The medical sector employs some of the region's most skilled and best paid professionals and para-professionals. The Cardiovascular Institute of the South, a nationally recognized leader in cardiac care and surgery, is headquartered in Houma (Terrebonne Parish). Proximity to the offshore energy industry has fostered development of skills in trauma care. Chabert Medical Center, also in Houma, is part of the state's Charity Hospital system and connected with the Louisiana State University Medical School. Private hospitals in Lafourche and Assumption Parish are affiliated with regional medical powerhouses like Ochsner Hospital in New Orleans and Our Lady of the Lake Hospital in Baton Rouge. Linking regional hospitals to the LONI system would enhance the region's ability to capitalize on its existing advantages. The region is strategically located to benefit from targeted marketing in Central and South American to position it as a center for cardiac and other medical care for patients from those areas.

Information Technology

The region continues to gain competitive advantage from its talent for innovation and invention, as well as its willingness to adopt new technologies. The region possesses a technologically savvy workforce. Local companies have been early adopters of 3-D Seismic technologies in energy exploration and global positioning systems (GPS) in the maritime industry. Chemical plant operators in the River Parishes use highly sophisticated computerized

systems to formulate product. A regional company developed a GPS data base to track chemical cargoes on the Mississippi River. Electronic fish finders and Loran used by commercial fishermen have become increasingly important as the price of fuel climbs. Computer aided design (CAD) and computer numerical control (CNC) technologies enhance the regional workforce's strong fabrication and metalworking skills, helping to shorten production times and improve quality. The programmable CNC machines ensure standardization of end products. Most current applications focus on the region's core industries, but these computer-based technologies can be adapted to a broad range of applications in other industries. A recent target industry study conducted for the River Parishes identified opportunities in the manufacture of control instruments for chemical processing and refining. Chemical production skills could also be adapted to bio-fuels production. Metalworking skills could be adapted to the making of steel at the Nucor Corporation plant currently considering a location in St. James Parish.

Additional Sectors

The region also has significant potential for development in sectors not previously identified in the five year CEDS.

Repair and Maintenance of Commercial and Industrial Machinery

Skill requirements match regional workforce skills in industrial maintenance, electric motor repair, welding, fabrication and machining. Due to high freight costs and quick turnaround requirements, much repair and maintenance activity is unlikely to move offshore. Slower economic growth increases demand as companies opt to repair existing equipment rather than purchase new machinery. In addition to repairs of American-made equipment, the region could find niche market opportunities in developing repair centers for imported equipment and machinery. This would capitalize on continuing nationwide growth in imports of equipment like excavators, packing and construction machinery, non-farm tractors, materials handling equipment and agricultural machinery (Tamerica. 2007).

Metalworking and Manufacturing

The regional workforce's strong metalworking skills can lend themselves to multiple applications. Niche market opportunities could include

Metal Tanks

The region has significant opportunities in the manufacture of metal tanks for the petrochemical industry. Again, the necessary skills match regional workforce skills in metalworking, welding and fabrication. As activity in development of alternative fuels increases, the region also has significant potential in the fabrication of pressure vessels used for gasification and liquefaction in production of synfuels. Only a few fabrication yards in the world have the capacity to handle these vessels, which typically measure 90 to 100 feet in diameter and 250 feet tall and are akin to ships in their size and complexity of fabrication. Sites on the Mississippi River offer the logistical advantage of allowing barge transporta-

tion of sections to their erection sites. This type of fabrication would also create demand for docks able to accommodate heavy-lift project cargoes (Tamerica. 2007).

Pumps and Compressors

Principal markets in the energy and petrochemical industries are well represented along the Gulf Coast. Workforce skills in metalworking and machining are well matched to the industry. There is also potential in innovations, such as solar-powered compressors, quieter and oil-less models and high-efficiency designs. Portable air compressors, on wheels and movable from site to site, are the fastest-growing segment of the market (Tamerica. 2007).

Imports for Retail Markets

Location on the Mississippi River and the combination of water, road and rail transportation already makes the Port of South Louisiana a key national gateway for export of grain and import of petroleum products. The same factors could position the port to participate in the massive trade in Asian imports for the retail market. Asian sourcing has spurred innovations to improve productivity in import operations. These include consolidating large volumes of imported freight at staging areas with proximity to intermodal facilities. The port could also benefit from the near gridlock congestion of the Pacific ports traditionally used for Asian imports. Steamship lines have begun looking for alternative ports on the Gulf and Atlantic coasts for shipments from Asia. This trend has been slowed by the congestion and limited capacity of the Panama Canal. However, the Panama Canal Authority is widening the canal to ease congestion and allow transit of the largest container ships. The improvements will be completed in 2014. The larger vessels can create bottlenecks at many ports, which lack sufficient land at the water's edge to store and marshal the large number of containers from each vessel. The River Parishes have the advantage of having large parcels of reasonably priced land, with mainline rail service, to serve as inland ports for handling of ocean containers. Although fuel costs have leveled off to some extent, but remain volatile. This could impact export traffic from China to the United States.

Potentials in Alternative Energy and Related Products

The five-year CEDS touched on the region's potential for growth related to production of alternative energy. This update to the CEDS expands consideration of potentials in alternate energy. A recent report on the future of energy (The Economist, 2008) noted that any transition to an economy based on renewable, alternative energy "is likely to be slow, as similar changes have been in the past. On the other hand, the scale of the market provides opportunities for alternatives to prove themselves at the margins and then move into the mainstream, as is happening with wind power."

At present, transportation is the nation's major consumer of refined petroleum products, accounting for over two-thirds of oil used. Electrical power generation consumes less than 2% of oil used. In 2004, 51% of the nation's electrical power was generated

using coal, 16% using natural gas and 3% using oil. Rising concerns over climate change, national energy security and soaring fuel prices have created a new urgency for the development of clean alternate energy sources. (U.S. Department of Energy. 2008).

The high-tech elite in places like Silicon Valley and the venture capitalists who finance them have begun working on marketable alternative energy ideas. So have major companies like General Electric, which already has a thriving wind-turbine business and is gearing up its solar-energy business. BP and Shell, two of the world's largest oil companies, and Dupont, the chemical giant, all sponsor both academic researchers and new, small firms engaged in commercializing innovative energy technologies (The Economist. 2008). Conoco Phillips, another major oil company, has entered into a joint venture with Tyson Foods to produce biodiesel with a new production process that uses chicken waste. The U.S. Defense Department is working with General Electric and Honeywell to produce lower-cost jet fuels from plants like soybeans. The U.S. Department of Energy has partnered with Chevron Corporation, the second-largest American oil company, to research potential for converting algae into biodiesel. The current process, the same one used to turn vegetable oil into biodiesel, has an estimated cost of more than \$20 per gallon. However, there is significant potential. While an acre of corn can produce about 20 gallons of oil per year, an acre of algae can produce a possible 15,000 gallons of oil per year. Algae can also offer other potential advantages: it wouldn't require converting cropland from food production; the process could use sea water; and the algae can help reduce pollutants from sewage and power plants (Times-Picayune. November 30, 2007).

The South Central region's existing energy infrastructure and skills offer competitive advantages for developing capacity in alternative energy production. The region understands the limits and needs of the industry and can build on the active presence and strong existing relationships with many of the major oil and chemical companies involved in exploring potential in alternative fuels. Applications based in the region are already under way. Renewable Energy Group is building a 60 mgw biodiesel plant in St. Rose. In the near term, the region's greatest potential appears to be in fuels produced from biomass based on cultivation and refining of sugar and other agricultural products and in wind and solar power. The large sugar refinery currently under construction in St. John the Baptist Parish will have the capacity when completed to process up to 70% of the state's total sugar crop. This, along with the region's other sugar mills and refineries, could provide a dependable supply chain. The region may also have opportunities in production of biodegradable plastics from biomass. Additional opportunities could include bioconversion and cogeneration at major industrial facilities, allowing onsite generation of power and/or heat to help meet processing energy demands. Excess electricity produced from cogeneration could be sold back to local electricity grids (Technology Assessment Division. Louisiana Department of Natural Resources). The Nucor Corporation steel plant which may locate in St. James Parish would use heat recovery coke and blast furnace technologies to make the plant energy self-sufficient and supply excess power to the local grid.

New energy technologies face a combination of market, tech-

nological and environmental challenges. This has necessitated significant federal subsidies and tax credits to support development of the new technologies. The goal is well worth the national investment. Only a few of the new ideas will succeed, but those that do could result in innovations adopted worldwide and thus ensure the nation's future prosperity. Positioning the South Central region to participate in such innovations could also help expand the region's future prospects.

Biomass

Biomass utilizes what are known as "feedstocks." These include agricultural and forestry residues, perennial grasses, woody energy crops, and wastes (municipal solid waste, urban wood waste and food waste). Biomass is unique among renewable energy resources in that it can be converted to carbon-based fuels and chemicals, as well as to electrical power. Major end-users include transportation fuels, products and power. Biomass has the advantage of being scalable as a near-term substitute for fossil fuels used in transportation while other alternatives are made market ready.

Brazil provides a working model of ethanol production and distribution based on sugar, which might be applied to the South Central region. Ethanol already provides 40% of the fuel consumed by Brazilian cars. Brazil should soon supply 15% of its own electricity through the burning of sugarcane waste (The Economist, 2008). Sugar-based fuels also seem likely to have less of an impact on food prices than converting other food crops like corn to fuel. Reports indicate an excess supply of sugar and the price has remained flat for the past 20 years (National Public Radio). The South Central region could find opportunities in converting sugarcane bagasse to "sugar-lignin" and "syngas." The latter turns the cellulose to a gas, which can be used for energy production or for chemical synthesis. The bagasse's high cellulose content gives it an economic advantage over wastes from logging operations, currently the principle source of feedstock for cellulosic ethanol in the United States (Tamerica. 2007).

Significant market barriers will have to be overcome before the biomass industry can develop on a national and regional scale. The cost of production remains high relative to fossil fuels. The new industry lacks fossil fuels' established supporting facilities and infrastructure. Upward price pressures and larger scale production of ethanol may reduce conventional fuels' price advantage, but use of blended fuels with higher ethanol contents would require expensive retrofitting of fuel pumps. Large-scale commercial deployment would require major changes in current agricultural practices, supply chains and distribution channels. Lack of integration of new technologies and infrastructure into model construction codes can complicate and increase the cost of permitting processes and delay introduction to the marketplace. Success depends on the level of industry and market awareness and acceptance.

There are also technical challenges involved in transporting ethanol. More corrosive than petroleum products, ethanol attacks metal components and extracts contaminants in existing pipelines. This downgrades the value of the ethanol and adds back-end costs to restore the product to meet specifications and ensure contaminants do not reach car engines. Ethanol also absorbs water, which

can result in separation of petroleum hydrocarbons and ethanol in ethanol blended fuels. The U.S. Department of Transportation and the toxic pipeline industry are partnering to address technical and regulatory barriers to biofuel pipelines. These efforts have gained from experience in Brazil, which already uses pipelines to transport the ethanol it produces from sugar.

Environmental issues will need to be addressed as well. Potential impacts of underground storage of ethanol, ethanol blended fuels and other biofuels are not yet well understood. Development of effective mitigation techniques will be necessary to prevent leaks from underground tanks that could lead to degradation of water and soil quality. Field studies indicate that the presence of ethanol may extend benzene plume lengths in underground water and may increase methane formation in soil gas above spills (U.S. Department of Energy, March 2008).

Wind Power

A 2003 Stanford University study cited coastal Louisiana as the top potential source for wind power in the United States. Neighboring Texas has shown similar potential and recently became the top state in the nation in the use of wind to produce electricity. A proposed project would float wind turbines in the Gulf of Mexico. Studies conducted by DOE have concluded that just three of the fifty states could provide enough electricity to power the entire nation and that offshore wind farms could do that same. Wind farm designers use specialized wind energy software applications to evaluate the availability of wind, the availability of transmission lines, the value of the energy to be produced, cost of land acquisition, land use considerations, and environmental impacts of construction and operations. Offshore locations have steadier winds and may offset higher construction costs with higher annual load factors, thereby reducing the cost of energy produced. Offshore locations could also avoid issues faced by onshore wind farms, including the large amount of land required, potential loss of crop land, and noise pollution. Again, development of wind power could also offer potential for manufacturing activities based on the region's metalworking skills, as well as for support activities in placing and servicing offshore turbines.

The industry continues to upgrade technology to address problems with earlier turbine designs. The new generation of turbines borrows from aircraft design, using sophisticated composite materials and equally sophisticated variable-geometry to make blades as long as possible. "Smart" designs include blades that can flex when the wind blows too strongly and thus "spill" part of the excess wind. This allows turbines with such designs to continue turning when others would have to shut down or risk damage. General Electric reports that, when it entered the turbine business in 2002, the average turbine was out of commission 15% of the time. The current downtime is less than 3%. As a result, the cost of energy produced with the use of turbines has dropped to about 8 cents per kilowatt hour (kwh) and is still falling. That makes wind power competitive with electricity generated using natural gas (Economist Special report on the future of energy, June 2008). Joining the push for wind power have been oilmen like T. Boone Pickens, who has begun airing nationwide television ads focused on the alternate power source.

Improvements are also underway in distribution of wind power. Europe has the beginnings of a DC grid linking Scandinavia, northern Germany and the Netherlands. The grid provides a model for connecting distant points, delivering power to market and allowing some slack for when the wind is not blowing in certain parts of the system. The development of smarter grids could allow constant monitoring of system loads and help smooth out any spikes in surplus supply and usage (The Economist, 2008).

An environmental issue raised regarding offshore wind farms has been the potential migratory and resident offshore birds could fly into the turbines. In addition to the impacts on the bird population, this could disrupt turbines' operation and efficiency and their ability to contribute to generation electricity for the region.

Solar Power

The South Central region has the advantage of abundant sunshine most of the year. Regional development related to solar power could provide electrical power for local use. Development might also extend to manufacturing and installation of solar technologies, utilizing existing regional skills in metalworking and practical adaptations of technologies. Two types of solar power systems currently available seem suited to the region. Concentrating Solar Power (CSP) systems use reflective materials to concentrate the sun's heat energy to drive a generator that produces electricity. Photovoltaics (PV) systems use semiconductor materials that convert sunlight directly to electricity. The U.S. Department of Energy's Solar America Initiative addresses issues and public policy barriers to "market transformation activities" facilitating acceptance and use of solar technologies. This includes identifying "best practices" in areas such as insurance and finance options; product certification; and codes and standards that facilitate installation. The initiative also addresses net metering and interconnection policies to credit solar power system owners for at least a portion of the electricity they generate.

High-tech innovations in photovoltaics currently under development are claimed to have the potential to increase efficiency by nearly 30% and to bring the capital cost of solar cells below \$2 a watt. That would close in on the cost of power generated by a coal-fired power station, which costs about \$1 billion to build. Thin-film photovoltaics, another technology under development, is not as efficient, but offers a much wider range of applications. Since it uses far less material, thin-film is considerably cheaper. Steel-based thin-film products are flexible and light enough to be used as building materials in their own right (The Economist).

Solar technology may face possible community-level challenges related to solar access for recharging versus tree coverage and shade.

Federal and State Aid Alternative Energy Development

The following is a partial listing of federal legislation promoting alternative energy development.

- **Sun Grant Research Initiative Act of 2003:** The purpose of the act was to help solve America's energy needs and revitalize rural communities through land-grant university research, education, and extension programs on biobased energy technologies and products.
- **American Jobs Creation Act of 2004:** The act created tax incentives for biodiesel fuel blenders/retailers and extended the tax credit for fuel ethanol blenders/retailers.
- **Energy Policy Act of 2005:** The act authorizes funds for biorefinery demonstrations and provides tax credits and incentives for small producers. The act also provides for renewable fuel credit trading and provides loan guarantees for projects that avoid or reduce greenhouse gases.
- **Energy Independence and Security Act of 2007:** The act establishes required rates for inclusion of renewable fuel in transportation fuels. It also establishes technology development grants for advanced fuels and creates renewable fuel infrastructure development grants. It also authorizes additional funding for commercial-scale biorefineries.

State and federal incentives for the use of renewable energy include the following (Louisiana Department of Natural Resources/Technology Assessment Division).

- **Louisiana Residential Solar Energy System Property Tax Exemption** exempts from ad valorem taxation any solar equipment (solar space heat, solar water heat, photovoltaics, solar pool heating) attached to any owner-occupied residential building or swimming pool.
- **Louisiana Tax Credit for Wind and Solar Energy Systems on Residential Property** provides a personal, corporate or franchise tax credit for solar and wind energy systems purchased and installed on or after January 1, 2008. Eligible systems include solar and wind energy systems for residential and multi-family residential dwellings. This refundable tax credit is 50% of all costs to a maximum of \$12,500.
- **Louisiana Machinery and Equipment Sales Tax Exemption for Cogeneration** exempts from state sales tax machinery and equipment used by an industrial manufacturing plant to generate electric power for self-consumption or cogeneration.
- **Louisiana Biodiesel Equipment and Fuel Tax Exemption** exempts from state and local sales and use taxes manufacturing machinery and equipment used to manufacture, product or extract unblended biodiesel, as well as unblended biodiesel used as fuel by a registered manufacturer.
- **Federal Residential Solar and Fuel Cell Tax Credit** provides a personal tax credit of 30% of the cost of the system up to a maximum credit of \$2,000 for solar electric and solar water heating systems and \$500 per 0.5 kw for photovoltaics and fuel cells.

- **Federal Business Energy Tax Credit** provides a commercial, industrial corporate tax credit for solar water heat, solar space heat, solar thermal electric, solar thermal process heat, photovoltaics, geothermal electric, fuel cells, solar hybrid lighting, direct use geothermal, and microturbines. For equipment placed in service from January 1, 2006 until December 31, 2008, the credit is 30%, up to a maximum of \$2,000 for each system for solar, solar hybrid lighting, and fuel cells and 10% for microturbines and geothermal. After January 1, 2009, the credit reverts to 10%.
- **Federal Alternative Motor Vehicle Credit** provides a tax credit of buyers of new alternative fuel vehicles placed in service after January 1, 2006. The tax credit is equal to 50% of the incremental cost of the vehicle. An additional 30% of the incremental cost for vehicles with near-zero emissions is also available. The credit, which can be passed back to the seller by non-tax paying entities, expires December 31, 2010.

Action Plan

This section focuses on progress in advancing goals and objectives and in projects implemented since the five-year CEDS. All three elements serve as performance measures to gauge the CEDS' usefulness to the region. Annual review by regional public and private partners also serves as an indicator of the CEDS' effectiveness in serving the region.

Demand for energy and waterborne commerce have spurred population growth and kept the regional economy strong despite the downturn in the national economy. Major industrial projects planned for the region reflect the region's economic strength.

- \$1.55 billion retrofit of Entergy's Little Gypsy Power plant in Montz
- \$3.2 billion expansion of the Marathon refinery in Garyville
- \$1.6 billion solid carbon gasification plant in St. James
- \$150 million sugar refinery project in St. John the Baptist Parish began with groundbreaking on April 16, 2008
- \$10 million in state funds will assist expansion of Edison Chouest at the Port of Terrebonne
- Valero Energy is undergoing a \$1.2 billion expansion, with another \$1.2 billion expansion in the permitting phase. The two expansions would make it one of the most complex refineries in the nation.
- \$200 million expansion of Monsanto's Luling facility.
- Renewable Energy Group's \$100 million biodiesel facility is under construction in St. Rose.
- \$8.5 million construction of Falk/Prager's light-manufacturing facility in St. Rose.
- Sealy & Company's \$5 million service center build-to-suit in St. Rose for Ceva Freight
- Entergy announced plans for a \$500 million upgrade to its Waterford 3 nuclear generating facility in Hahnville.
- Possibility of a new, \$200 million metal recycling facility & logistics terminal in Killona
- Possibility of \$2 billion Phase I and \$1 billion Phase II Nucor steel plant in St. James, if environmental permits and state incentive packages can be negotiated.
- Nucor also plans to build a new, high-capacity port on the river capable of handling ocean vessels, as well as barges of coal and pig iron.
- John Deere in Thibodaux does not plan to expand its facility, but will invest in upgrading to higher technology, replacing older machines and adding tooling and new machines to enhance their productivity over the next five years.

Funding for major public projects remains a challenge. Many communities in the region have limited resources to repair or replace aging infrastructure and to implement projects critical to reducing coastal erosion and improving flood protection. If

the 2005 hurricanes can be said to have a silver lining, it would be the federal resources committed to repair and replacement of damaged public infrastructure. The events of 2005 also helped highlight energy-security reasons the rest of the nation should continue to invest in the South Central region. FEMA Hazard Mitigation funds, with a 25% match from the Louisiana Community Development Block Grants disaster recovery program, have helped local governments implement projects that reduce long-term vulnerability. These include improvements to pump stations, elevation of water treatment facilities, and construction of flood walls. The region has, as well, exhibited a talent for winning allies and developing creative approaches to funding projects.

- Federal funding for the Morganza to the Gulf flood control project has stalled, but until it was halted by an environmental lawsuit, construction of Reach 1 in the vulnerable Point-aux-Chenes area moved forward with local funds generated by a ¼ cent sales tax passed by Terrebonne Parish voters
- \$1.4 billion four-phase project to elevate and upgrade LA Highway 1 began construction of Phase I, the new, elevated Leeville Bridge, in March 2006, with completion of the bridge expected as early as the summer of 2009. Project funding combined federal and state funds and federal revenue bonds backed by bridge tolls.
- The U.S. Departments of Energy and Homeland Security support efforts to secure the \$250 million required for Phase 2 of the LA I Project, the elevated roadway from Leeville to Golden Meadow.
- The Fourchon Region Restoration Initiative (FRRI) is developing a master plan to restore Elmer's Island and West Belle Pass. The initiative, which will also help protect Port Fourchon, brings together the Greater Lafourche Port Commission, the Louisiana Offshore Oil Port, the Chevron and Shell Oil Companies and the Wisner Foundation, the area's major landowner. Participants in the consortium will provide matching funds required for major federal grants.

Performance Measures

- **Goal One:** Improve the public infrastructure of the region in order to support and sustain a viable economy and environment.

Objective 1: Improve road infrastructure and capacity

- Complete Leeville bridge crossing and continue LA Highway 1 improvements
- Review elevation of Leeville Bridge access ramps to minimize vulnerability to high-water events
- Build an East/West road to connect Globalplex to Interstate 10 (Port of South Louisiana)
- Continue efforts to complete I-49
- Continue development of Master Transportation Plan for the River Parishes (Thibodaux Road Extension)
- Develop a transportation loop around Thibodaux
- Monitor plans for creation of North-South Access Road between LA Hwy 3127 and US Hwy 90

- Continue to investigate adequacy of La. Highways 1 and 308 as alternate hurricane evacuation routes through Assumption Parish
- Continue repairs and upgrades to other State and local roads
- Widen La. Highway 20 in Thibodaux
- Replace/expand Tiger Drive Bridge in Thibodaux
- Four lane La. Highway 3127 from Edgard to Donaldsonville
- Study feasibility of widening U.S. Highway 61 (Airline Highway) in the River Parishes as part of the New Orleans area Regional Planning Commission Metropolitan Planning Organization (MPO) program.

Accomplishments

Construction of Leeville Bridge, begun in March 2006, is anticipated to be completed in the summer of 2009. Efforts continue to secure federal funding for Phase II of the LA 1 Project, the elevated highway from Leeville to Golden Meadow, estimated to cost \$250 million. The road connecting the Gramercy Wallace Bridge and La. Hwy. 3127 has been completed. SCPDC continues to develop the Master Transportation Plan for the River Parishes, with part one scheduled for preliminary release in August 2008. The region continues to monitor the North - South Access Road, including investigation of LA 1 and LA 308 as evacuation routes.

In the coming year, the region will continue to monitor progress of all of these projects.

Objective 2: Improve water and wastewater treatment and collection capacities

- Continue to upgrade water treatment facilities and capacities in all communities
- Continue to improve wastewater treatment and build additional collection systems throughout the Region
- Identify funding sources and assist member governments in securing funds to provide wired-in generators to ensure alternate, redundant sources of power to keep water and sewer systems operational during power outages.
- Continue to investigate ways to improve water flow along Bayou Lafourche and counteract salt water intrusion
- Provide linkage between the St. Charles East and West Bank water treatment facilities and provide additional treatment capacity for the East Bank
- Continue efforts to upgrade old and provide new or expanded municipal wastewater systems throughout the Region through Community Development Block Grant projects
- Complete EPA funded wastewater treatment feasibility analysis for Bayou Area and River Region West Bank
- Identify priorities of sewerage projects for implementation
- Prepare engineering work for update of St James Parish-wide Sewage System facilities plan
- Increase wastewater treatment capacity for the West Bank of St. Charles.
- Continue to investigate Bayou Lafourche Diversion Project
- Upgrade salt water control on Bayou Lafourche south of

Lockport, on the Gulf Intracoastal Waterway and in the Houma Navigation Canal

- Implementation of Bayou Lafourche locks at Golden Meadow

Accomplishments

Implementation of the first phase of the Bayou Lafourche reintroduction project is about to begin with dredging to increase water flow in the northern 6.2 miles of the bayou. The project, extending as far as Donaldsonville, will be implemented under the existing Bayou Lafourche Freshwater District permit, with participation by the U.S. Army Corps of Engineers and the Coastal Protection and Restoration Authority. St. John the Baptist Parish received an EDA award and is proceeding with upgrading of the Lions Water Plant to accommodate the new sugar refinery. Lutchter has requested an emergency EDAP grant and other emergency funding to upgrade its water intake structure, which is in danger of falling into the Mississippi River. The City of Thibodaux has received an EDA award and is in process of upgrading its sewer pump capacity in order to serve growing programs like the John Folse Culinary Institute at Nicholls State University. St. Charles Parish is proceeding on construction of a waterline under the Mississippi River to connect its two water plants. St. Charles is also continuing sewer improvements. St. James Parish is moving toward the goal of parishwide sewerage and is negotiating with the two municipalities of Gramercy and Lutchter to include them in the project, which will begin with installation of three community sewer systems on the east bank (in Paulina, Union and Convent) and two systems on the west bank (in Vacherie and Welcome). Gramercy has completed several phases of its plan to upgrade its water treatment system. Terrebonne Parish is about to install sewerage along Denley Road, in the Woodlawn Industrial Park. The area is currently served by a septic system. SCPDC, under two grants from the Environmental Protection Agency, has conducted wastewater feasibility analyses in the region. The first grant provides funding for the analysis in the Bayou Parishes (Assumption, Lafourche and Terrebonne). The second grant provides funding for the analysis of the west banks of St. James, St. John and St. Charles Parishes. These programs are identifying available treatment capacities and identifying priority projects for implementation.

Work will continue on each of these objectives during the coming year.

Objective 3: Improve public facilities and services

- Continue upgrades to public libraries
- Provide generators to allow public libraries to be used after disasters as sites to allow businesses to use laptop computers, to charge cell phones and thus continue to function and do business.
- Provide public transit throughout the region, including inter-city service through the River Parishes.
- Continue efforts to improve regional health facilities and services
- Improve neighborhood and municipal parks
- Continue work with the Regional Criminalistic Laboratory

- Continue Regional Solid Waste Authority efforts to address solid waste disposal and transportation issues
- Upgrade fire protection facilities throughout the Region

Accomplishments

Parishes continue to upgrade libraries throughout the region. The River Parishes Transit Authority for St. John and St. Charles Parishes received start-up funding from the Federal Transit Administration and the La. Department of Transportation and Development and is moving toward implementation. The SCPDC, under a grant from the FTA, continues to analyze the feasibility of providing public transit service in Thibodaux. Lafourche Parish is exploring the possibility of a transit study for the parish. LA DOTD continues work monitoring plans to offer intercity rail service between Baton Rouge and New Orleans.

In the coming year the region will continue to monitor and implement these programs.

Objective 4: Continue infrastructure improvements at area ports and airports

- Construct improvements at all area airports
- Construct a road to connect the South Lafourche Airport to La. Highway 3235, including a Bayou Lafourche Bridge crossing.
- Continue to pursue general cargo opportunities to better serve the maritime industry
- Develop a public dock on the West Bank of St Charles Parish
- Construct conveyor from docks to service lay-down areas at Globalplex (Port of South Louisiana)
- Rail spur rehabilitation and extension with warehouses for Globalplex Intermodal Terminal
- Increase warehouse and distribution capacity at the Port of South Louisiana
- Completion of Northern Expansion project at Port Fourchon
- Convert Golden Meadow and Larose floodgates into locks in order to facilitate waterborne commerce during high water stages
- Explore feasibility of establishing rail service to Port Fourchon
- Support initiatives to improve public facilities and access to Port Fourchon beaches
- Complete EIS and Feasibility Studies for North-South Corridor connecting Port Fourchon to I-10
- Provide rail service to the Port of Terrebonne
- Complete infrastructure improvements at the Port of Terrebonne facility
- Deepen the existing east-west channel connecting the Houma Navigation Canal to Port Fourchon to 12-feet to facilitate flow of traffic between the ports of Terrebonne and Fourchon Continue efforts to ensure the planned Houma Navigation Canal and lock system are designed for medium

draft vessels at 200 feet wide and 20 feet deep

Accomplishments

The Port of South Louisiana received \$1 million in state supplemental appropriation funding, with half of the funds allocated to extend the runway at the St. John the Baptist Parish airport from 4,000 to 5,000 feet and the other half going toward initial phases of various port expansion projects. These include purchasing options on property near the potential steel mill site in St. James, Parish; site selection of a new port facility on the west bank of the Mississippi River in the River Parishes; and new office buildings at the port's Globalplex complex in Reserve. The Port of Terrebonne received an EDA award to provide bulkheading at a location to accommodate a major tugboat builder and began construction of the project in 2007. The Greater Lafourche Port Commission has completed and leased all 5,300 feet of Slip B of its Northern Expansion. In early 2007, the Port Commission began construction of an additional 3,600 feet of bulkhead in the Northern Expansion, with 1,400 feet pre-leased. The project to convert the Golden Meadow floodgates to locks is under construction.

The region will continue to monitor these programs and projects in the coming year.

Objective 5: Improve flood protection and drainage

- Improve area levees, in particular the Morganza to the Gulf and other hurricane protection levees
- Support efforts to create a Comprehensive Hurricane Protection Plan for Coastal Louisiana
- Support Governor's LA 1 Task Force plans for hurricane evacuation route from Grand Isle to Alexandria
- Continue drainage improvements throughout the Region
- Reduce regional businesses' vulnerability to natural disasters by coordinating informational resources to facilitate preparedness and recovery planning
- Continue to upgrade and improve area pump stations and pump capacities
- Construct the West Bank flood protection levee and support planning and implementation of Donaldsonville to the Gulf project to help protect St. Charles Parish
- Construct hurricane protection levee from St. John the Baptist to Ascension Parish north of Interstate 10.

Accomplishments

Parishes and levee districts continued to work on flood protection projects throughout the region. For the 2008 hurricane season, Lafourche and Terrebonne Parishes have taken a cooperative approach, with a single individual overseeing and coordinating administration of three flood-protection levee systems. St. Charles has let the RFP for development of a Master Drainage Plan. Lafourche Parish has applied for LCDBG disaster recovery funding to develop its Master Drainage Plan. St. James Parish is elevating its water treatment facility. Lafourche Parish plans to implement a parishwide improvement plan at 20 pump stations and will apply for additional disaster recovery funding to improve another six pump station. Lafourche also plans to

construct an industrial park floodwall in the southern part of the parish. Lafourche Parish and Greater Lafourche Port Commission are cooperating on a project to develop a safe harbor inside the South Lafourche levee system to protect fishing boats. Terrebonne Parish's capital outlay boardwalk project in downtown Houma includes a safe harbor for fishing boats at the nearby public marina.

■ **Goal Two:** Create and retain quality jobs and foster a more diversified economy.

Objective 1: Work within existing industry sectors to identify workforce development and training needs.

- Continue efforts to design education programs that match training to the area job market and update capacity to track training efforts
- Support efforts to expand on existing job training programs, including industry-focused "Centers of Excellence" in Emergency Preparedness and Response and Marine Manufacturing Technology at Louisiana Community and Technical Colleges
- Explore potential for building on existing institutional assets like the Chef John Folse Culinary Institute at Nicholls State University and the Louisiana Coastal Recovery Authority, the Barataria-Terrebonne National Estuary Program and the Louisiana Universities Marine Consortium in implementing additional training alliances
- Explore potential for developing an additional "Center of Excellence," focused on job training for the marine logistics industry in the River Parishes
- Increasing coordination to bridge basic and occupational skills training for adults with limited education and skills and linking training to workforce needs identified by employers
- Coordinate with the Greater New Orleans Region SBDC and regional Chambers of Commerce to expand on existing leadership programs to develop a regional "young president's forum" to provide mentoring and peer networking to improve fledgling entrepreneurial companies' chances of success
- Explore potential for using the St. James Parish mobile classroom program as a model for taking sector-specific job training linked to actual employment opportunities into communities where a significant part of the adult population possess limited education and skills
- Explore potential for local adaptations of model joint labor/management partnership programs and of state community colleges and community-based organizations to improve access to on the job and skill training
- Support efforts to expand the business incubator created Nicholls State University in cooperation with South Louisiana Economic Council

Accomplishments

L. E. Fletcher Community and Technical College continued its program and facility expansion plans. The Vocational-Technical Schools in Thibodaux, Galliano and Reserve continue to offer skills training and to provide customized training to employers. An EDA grant to the City of Thibodaux will enable increased pump capacity to serve the Nicholls State University campus and support its planned expansion of the Chef John Folse Culinary Institute. The South Central Industrial Association (SCIA)'s "Work It, Louisiana" project airs television commercials to inform young people about employment and training options.

Objective 2: Provide technical support and infrastructure necessary to support start up, relocation and recruitment of businesses

- Create business incubators in Thibodaux and Terrebonne Parish and other communities and continue to support the incubator program in St. Charles Parish
- Provide ongoing technical assistance concerning tax incentives and loan programs
- Administration and expansion of the SCPDC Revolving Loan Fund Program
- Continue Enterprise Zone Assistance
- Increase the number of regional businesses marketing on-line in order to enhance individual firms' ability to return to business, even if a storm or other disaster destroys or damages their physical facility
- Create a micro-lending program for very small businesses and self-employed individuals.

Accomplishments

The Greater New Orleans SBDC, located at Loyola University, now serves the SCPDC region. Loans made through the Business Recovery Grant and Loan Program will recapitalize and significantly expand the capacity of the regional RLF to provide gap financing to regional small businesses.

Objective 3: Support research and development of new and emerging sectors

- Continue to develop warehousing, light industrial and high technology sectors in St Charles Parish
- Investigate feasibility of a warehouse distribution center in St John the Baptist and St. James Parishes
- Explore potential to expand on existing institutional structures at Nicholls State University to create cluster development centers to spur technological innovation and commercialization and export of products, expertise and services in the maritime-shipbuilding, culinary and information technology industries
- Increase coordination among training providers and the business community in order to explore potential for undertaking regional, cluster-based workforce development, planning, training, job matching and outreach
- Further the development of a distribution, light industrial, energy and advanced manufacturing cluster in St. Charles Parish with programs providing needed job and skill training

- Assist expansion of high-quality shrimp business model using on-boat freezing and direct, contract-based marketing to increase price per pound.

■ **Goal Three:** To improve the overall capacity of the Region to make efficient land use decisions.

Objective 1: Develop and/or update Parish Comprehensive Plans

- Complete Assumption Parish Comprehensive Plan
- Complete Terrebonne zoning effort in areas outside Houma
- Update the Lutchter Zoning and Subdivision Ordinances
- Explore possible land use Master Plan for Lafourche Parish
- Explore possible comprehensive plan for St. James Parish
- Update the St Charles Parish land use plan
- Continue to keep parish and municipal codes current

Accomplishments

SCPDC and Assumption Parish are wrapping up work on the parish's Comprehensive Plan. The parish is considering land use controls. Terrebonne Parish plans to update its strategic plan and is moving forward with recommendations for zoning in areas surrounding Houma. Parishes and municipalities continued to update their codes and make land use planning decisions. SCPDC has begun conversations with St. James Parish regarding a possible comprehensive plan and land use controls.

Objective 2: Develop and implement other programs that enhance existing land uses and encourage development near existing centers of business and industry

- Continue to share expenses related to enforcement of the State Uniform Building Code through participation in a regional inspection program
- Continue updating of historic structure inventory
- Revitalize the Thibodaux CBD and Historic District Area
- Investigate feasibility of creating historic districts in Lockport, Napoleonville and Reserve
- Investigate feasibility of developing mini-Main Street program for communities along the Bayou Lafourche Corridor
- Plan for access and development along U. S. Highway 90 (future I-49 corridor)
- Extend the boardwalk along Bayou Terrebonne in Houma into the central business district.

Accomplishments

The Regional Building Code Council has had a successful first year and has reduced inspection costs for residents. Consistent enforcement has attracted the interest of private insurers and may encourage some to return to the regional insurance market. SCPDC continues to update the historic structure inventory. SCPDC has begun conversations with the municipalities of Lockport and Napoleonville regarding a possible mini-Main Street program. The extension of the boardwalk along Bayou Terrebonne in Houma was funded in the state capital outlay budget.

Objective Three: Promote development practices that reduce vulnerability to severe weather events.

- Continue public education efforts to inform the public of the location of flood-prone areas.
- Continue educational programs for contractors on practices like use of pervious paving to reduce runoff.

Objective Four: Promote mitigation efforts such as elevating existing structures in flood-prone areas to reduce risk.

- Continue to utilize FEMA mitigation program and other programs to assist homeowners in elevating houses.

Objective Five: Promote use of pervious paving to reduce runoff that can contribute to flood risk.

- Continue contractor education program.

■ **Goal Four:** To improve the overall capacity of the Region to make economic development decisions.

Objective 1: Identify Sites Suitable for Various Types of Industrial Development

- Update and continue existing site inventories
- Create GIS based inventories of available sites for communities where none exist
- Inventory and assess brownfields sites to foster redevelopment
- Explore potential and support of an amendment to the National Flood Insurance Program that would allow coastal homeowners to purchase flood and wind protection in the same policy.

Accomplishments

SCPDC's brownfields grants have funded environmental assessment of a number of properties to assist the revitalization of downtown Lockport in Lafourche Parish, as well as the assessment of the former Supreme Sugar property in Assumption Parish. Additional brownfields assessments to aid development of a recreational area in a low income community and of supported senior housing are currently in the pipeline. SCPDC developed parish profiles, which were posted on the South Louisiana Economic Council website. SCPDC also added a number of sites to the Louisiana Economic Development statewide inventory. The Port of South Louisiana continues to maintain a GIS site inventory within the River Parishes and SLEC is developing a program which will accomplish a similar goal in the Bayou Region.

Objective 2: Support efforts that sustain regional tourism

- Support coordination of efforts of area tourism commissions and chambers of commerce to promote regional culture and heritage
- Promote the culture and heritage of the entire region
- Develop docking facilities at Oak Alley and other tourist attractions along the Mississippi River
- Expand tourism efforts throughout the South Central Region
- Continue implementation of Bayou Lafourche Corridor

Plan to develop cultural and ecological assets

- Provide additional public access to outdoor scenic and recreational areas such as Lake Verret
- Explore potential for coordination among regional tour bus and hospitality industry to create a shuttle bus service from the New Orleans airport to locations in the district.

Accomplishments

SCPDC updated the Parish profiles used by the Louisiana Department of Economic Development for the region and identified a prime site in each parish that is being promoted for development. The South Louisiana Economic Development Council's website promotes its region (which includes part of the South Central district) and features sites suitable for development, demographic information, tourist information and other important data that will promote the area. SCPDC will continue to assist SLEC as possible to enhance the site.

Objective 3: Continue to explore opportunities to further new and emerging sectors

- Hold one or more workshops to present information on cluster development and emerging sectors
- Increase the Region's understanding of industry sectors and their role in the regional economy
- Increasing linkages to connect the business community and university-based research and development expertise in order to expedite innovation, early adoption of new technologies, development of information technology products and services and entry into export markets
- Coordinating with the Small Business Development Center at Loyola University in New Orleans, Chambers of Commerce and other development organizations to offer small businesses access to up-to-date, industry oriented market data to help them forecast and respond to market and industry trends and identify and act on opportunities
- Continue to implement construction of community-based projects included in the Bayou Lafourche Plan to foster revitalization along the Bayou Lafourche waterfront from Donaldsonville to the Gulf of Mexico.
- Investigate feasibility of pursuing Congressional designation of Bayou Lafourche Corridor as a National Heritage Corridor.

Accomplishments

Assumption and Lafourche Parishes and the municipalities of Napoleonville, Lockport, Thibodaux and Golden Meadow have begun implementation of elements of the Bayou Lafourche Corridor Plan. The Village of Napoleonville has obtained Transportation Enhancement funds to develop a bayou side park across from the Assumption Parish Courthouse. Lockport has begun interior construction on its new Louisiana Wooden Boat Museum, located in the former Ford dealership on Main Street (c. 1917). Future plans call for an elevated wetlands walkway across the bayou, in the area of the old locks. Lafourche Parish is in the design phase of the Central Market at the junction of the La. Hwy. 1 and U.S. Highway 90 in Raceland. Ongoing plans call for devel-

opment of a Cajun Village of shops adjoining the market and a park and ride location under the Highway 90 overpass. The parish is working with the Louisiana Department of Transportation and Development to secure Transportation Enhancement funds for development of the Bayou side Wharf and Overlook, also planned for the area. Lafourche Parish has applied for Louisiana Endowment for the Humanities funding to develop a web-based driving tour of the parish.

Objective Four: Improve regional knowledge of resources providing small business assistance

- Invite Small Business Development Center (SBDC) serving the region to address CEDS review committee, the SCPDC board and business groups.
- **Goal Five:** To improve the fiscal capacity of local government and to make the Region financially attractive for economic development.

Objective 1: Identify existing incentives

- Prepare and continue to update a brochure on existing regional and state incentive programs
- Identify new incentives and other programs that would be of use to existing and developing cluster industries
- Investigate feasibility of implementation of such programs
- Identify other assistance programs that area industry would find helpful

Accomplishments

SCPDC hosts annual workshops on incentive programs offered by the state. The target audience is businesses. Workshops held in cooperation with BTNEP focused on comprehensive planning and economic development as part of the comprehensive planning effort.

Objective 2: Investigate the potential of creating new incentives geared toward growth sectors

- Encourage cooperation and joint production and marketing ventures among businesses in sectors and across interrelated "super cluster"
- Cooperate with the business community, parish economic development departments, Chambers of Commerce and other development organizations to implement a district wide business retention program to counter migration of businesses and innovations out of the region
- Explore potential to increase the regional pool of investment capital for entrepreneurial development in the district by utilizing incentives such as tax credits under the Louisiana Early Stage Angel Investment Incentives program
- Increase the number of regional businesses qualifying for tax credits and abatements under the Louisiana Enterprise Zone, Quality Jobs and Industrial Property Tax Exemption programs
- Encourage the use of the Louisiana Brownfields Tax Credit to reduce the cost of cleanup of properties that have undergone environmental assessment

- Increase the number of regional businesses complying with ISO 9000 and ISO 1400 standards in order to improve quality control and increase “exportability” of local products, expertise and services
- Investigate potential to develop strong regional branding of food and tourism products and services and promoting improved coordinated scheduling of festivals and other events, bundling of services and use of the internet to organize and market tour packages
- Explore possible resources to establish a micro-loan fund for entrepreneurs in self-employment businesses such as tour guide and craftsperson in the tourism and eco-tourism cluster
- Encourage the use of state and federal incentives to promote growth related to production and use of alternate energy resources.

Accomplishments

The region’s economic development planners continue to promote development within regional sectors. The Business Recovery Grant and Loan program will significantly expand the regional RLF’s capacity to provide gap financing to regional small businesses. Information on the Louisiana Brownfields Tax Credit will be added to regional incentive workshops SCPDC hosts.

- **Goal Six:** To protect and conserve the natural resources of the Region and to promote more equitable use of these resources for business and recreation.

Objective 1: Conserve the available resources for future generations

- Promote the wise and sustainable uses of non-renewable resources
- Create education and outreach programs that promote same

Objective 2: Advance implementation of barrier island, wetland and levee projects to protect communities and regional economic interests

- Implement Barrier Island Restoration Projects
- Implement the Coast 2050 Ecosystem and Louisiana Coastal Area Strategies and the Coastal Protection and Restoration Authority of Louisiana Comprehensive Coastal Protection Master Plan
- Promote fresh water diversions from the Mississippi River into Bayou Lafourche and to restore coastal wetlands and marshes
- Explore potential for development related to renewable energy resources.

Accomplishments

Barrier island restoration projects are ongoing, despite ongoing losses to events like the 2008 storms. The first phase of the Bayou Lafourche diversion project is about to begin.

Objective 3: Recognize open land, marsh, wetlands and barrier islands as critical infrastructure providing friction to help reduce the region’s vulnerability to high-water events.

- Continue public information efforts to raise regional residents’ and stakeholders’ awareness of how all elements of the regional system, both natural and manmade, can work together to reduce vulnerability.

Objective 4: Identify and promote eco-tourism opportunities

- Continue to promote events like the annual Grand Isle Birding Pilgrimage.

Accomplishments:

The guidebook developed based on comprehensive planning and sustainability workshops conducted by SCPDC and the Barataria Terrebonne National Estuary Program (BTNEP) focused on comprehensive planning, economic development planning, implementation tools and conservation easements and similar programs. The Fouchon Regional Restoration Initiative (FRII) offers the prospect of effective action, backed by significant funding, to simultaneously protect key natural areas and vital economic interests.

- **Goal Seven:** Pre-Plan to improve the region’s emergency operations and recovery systems

Objective 1: Develop quick recovery plan and use it as a regional marketing asset.

- The recovery plan will recognize periodic severe weather events as a fact of life for the region and focus on mitigation to reduce vulnerability and planning to expedite recovery.

Objective 2: Establish uniform re-entry policies and inter-governmental agreements to allow essential personnel and businesses to cross through neighboring neighborhoods as necessary.

- Establish re-entry policies that track the state plan: Tier 1—critical services and infrastructure repair; Tier 2—oil field service and environmental impacts; Tier 3—critical retail, including fuel, pharmacies, groceries and critical medical services.
- Reduce misinformation by develop systems for communicating to businesses and members of the public who have to wait for re-entry.

Objective 3: Develop alternate power sources for critical infrastructure, businesses and public services.

- To ensure the availability of alternate power for critical services during emergency power outages, assist member governments and other key entities in the purchase and installation of wired-in generators.
- Assist critical businesses such as fuel, pharmacies, groceries and critical medical services to purchase and install wired-in generators to provide alternate power during power outages.
- To reduce potential business failures following disasters, provide generators at public libraries so businesses can use laptop computers and charge cell phones and return to at

least partial operation as soon as possible.

- Identify resources to aid regional businesses in marketing on the internet and utilizing other strategies to continue generating income and reduce potential for business failures.

Objective 3: Improve emergency operations center communications during emergency situations to provide businesses with critical, up-to-date information.

- Develop data bases with contact information for regional businesses by parish, industry sector, etc.
- Use electronic newsletters, regular press releases and other methods for keeping businesses informed during and after disasters. This could include re-entry schedules and assistance available to businesses.

Strategy Committee, CEDS Distribution and Process

SCPDC goal is to make the CEDS a living document of maximum use to the region. SCPDC has, as per EDA guidelines for the CEDS process, appointed a Strategy Committee. The distribution list, expanded for this year's CEDS, represents the main economic interests of the region. This includes private sector representatives, as well as public officials, community leaders, representatives of workforce training institutions and private individuals. All those on the distribution list were invited to attend two CEDS review meetings or to send their representatives or designees. A number of those unable to attend or send a representative to the CEDS review meetings provided comments and input by telephone or email.

SCPDC CEDS 2008 Distribution List

Name	Organization
Andrew Barron	Barataria-Terrebonne National Estuary Program
Anne Perry	Louisiana Economic Development
Ardyn Thriffiley	Port of South Louisiana
Audrey Temple	St. James Parish-Economic Development
Bonne LaFont	City of Thibodaux
Carmen Sunda	Louisiana Small Business Development Centers
Charles Gaiennie	South Louisiana Economic Council
Cindy Fromherz	Greater New Orleans Foundation
Corey Faucheux	St. Charles Parish-Economic Development
Cullen Curole	SCPDC-Economic Development
David Rabalais	Port of Terrebonne
Dawn Lopez	Chet Morrison Construction
Doug Short	IMS Refrigeration
Earl Hicks	Houma-Terrebonne Airport Commission
Faye Washington	St. James Parish-Human Resources
Gretechn Caillouet	Lafourche Parish-Economic Development
Henri Boulet	LA 1 Coalition
Henry Sullivan	Port of South Louisiana
Jane Arnett	South Central Industrial Association
Jim Edmonson	South Louisiana Economic Council
Jim Sublett	South Louisiana Bank
Jo-Anna Jones	SCPDC
Jody Chenier	St. James Parish

Kara Renne	New Orleans Regional Planning Commission
Katherine Gilbert	Terrebonne Economic Development Authority
Kevin Belanger	SCPDC-CEO
Kim Torres	Assumption Parish
Kim Marousek	St. Charles Parish-Planning
Linda Prudhomme	Port of South Louisiana-Economic Development
Lisa Maloz	Terrebonne Economic Development Authority
Louise Billiot	United Houma Nation
Mart Black	Providence Engineering
Martha Cazaubon	SCPDC
Michelle Edwards	Terrebonne Economic Development Authority
Mike Ferdinand	Terrebonne Economic Development Authority
Mike Voisin	Motivatit Seafood
Pat Gordon	Terrebonne Parish-Planning
Paul Aucoin	St. James Parish-Tourist Commission
Richard Champagne	Town of Lockport, Mayor
Richard McCarthy	Market Umbrella
Ron Gallagher	Iberville Bank
Simone Maloz	Restore or Retreat
Ted Falgout	Greater Lafourche Port Commission
Travis Lavigne	L.E. Fletcher Community & Technical College
Vic LaFont	South Louisiana Economic Council
Wiley Matherne	Community Bank
Windell Curole	South Lafourche and Terrebonne Levee District

Quarterly Strategy Committee Meetings

This year's CEDS review process recommended quarterly meetings of the Strategy Committee to provide regular input in the CEDS planning process. As shown below, preliminary appointees to the Strategy Committee to participate in these quarterly meetings are economic development professionals employed by member governments. A second round of appointments, currently underway, expands the Strategy Committee to include a majority of private sector representatives.

SCPDC CEDS 2008 Review Committee

Name	Organization
Anne Perry	Louisiana Economic Development
Audrey Temple	St. James Parish-Economic Development
Bonnie LaFont	City of Thibodaux
Chet Chaisson	Greater Lafourche Port Commission-Economic Development
Cindy Fromherz	Greater New Orleans, Inc.
Corey Faucheux	St. Charles Parish-Economic Development
Cullen Curole	SCPDC-Economic Development
David Rabalais	Port of Terrebonne
Earl Hicks	Houma-Terrebonne Airport Commission
Grethcen Caillouet	Lafourche Parish-Economic Development
Julia Remondet	St. John the Baptist-Economic Development
Kim Torres	Assumption Parish
Linda Prudhomme	Port of South Louisiana-Economic Development
Mike Ferdinand	Terrebonne Economic Development Authority
Vic LaFont	South Louisiana Economic Council

CEDS Review Meetings

All of those on the initial distribution list were invited to participate in a CEDS review meeting in July 2008.

SCPDC CEDS 2008 Review Meeting

Initial Meeting

July 17, 2008

Louisiana Department of Transportation and Development
Gray, LA

Participants	Organization
Mike Ferdinand	Terrebonne Economic Development Authority
Audrey Temple	St. James Parish-Economic Development
Martha Cazaubon	SCPDC
Kim Marousek	St. Charles Parish-Planning
Anne Perry	Louisiana Economic Development
Grethcen Caillouet	Lafourche Parish-Economic Development
Cullen Curole	SCPDC-Economic Development
Jo-Anna Jones	SCPDC

Comments and recommendations from the Initial CEDS review meeting were incorporated into the CEDS document just prior to Hurricanes Gustav and Ike. The second review meeting, originally scheduled for September 10, 2008, had to be rescheduled. The second meeting eventually took place two weeks later, on September 25, 2008.

Second Review Meeting

September 25, 2008

South Central Planning and Development Commission
Gray, LA

Participants	Organization
Martha Cazaubon	SCPDC
Anne Perry	Louisiana Economic Development
Mike Ferdinand	Terrebonne Economic Development Authority
Audrey Temple	St. James Parish-Economic Development
Cullen Curole	SCPDC-Economic Development
Jo-Anna Jones	SCPDC

The second CEDS review meeting generated recommendations to improve regional planning for disaster response. These recommendations have been incorporated into this year's CEDS.

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