

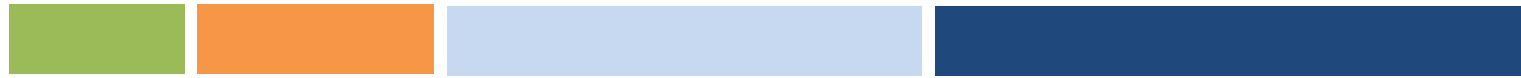


## An Economic Enhancement Strategy for Terrebonne Parish, Louisiana

September 1, 2016

Prepared for the





## TABLE OF CONTENTS

<b>Executive Summary.....</b>	<b>2</b>
<b>Chapter 1: Where Terrebonne Parish Stands as a Place for Business.....</b>	<b>5</b>
<b>Chapter 2: Optimal Targets for Terrebonne Parish.....</b>	<b>20</b>
<b>Target 1: Food Manufacturing &amp; Related Services .....</b>	<b>22</b>
<b>Target 2: Energy &amp; Marine Production &amp; Support Services.....</b>	<b>26</b>
<b>Target 3: Coastal Restoration .....</b>	<b>31</b>
<b>Target 4: Aviation and Avionics.....</b>	<b>35</b>
<b>Target 5: Health Services.....</b>	<b>40</b>
<b>Target 6: Professional Services .....</b>	<b>45</b>
<b>Transferability of Skills From The Oil &amp; Gas Industry .....</b>	<b>58</b>
<b>Chapter 3: Observations—Where Do We Go from Here? A Site Selector’s Perspective .....</b>	<b>61</b>
<b>Enhance the Product (Product Improvement).....</b>	<b>63</b>
<b>Tell the Story (Marketing) .....</b>	<b>68</b>
<b>Execute Effectively (Effective Service Delivery).....</b>	<b>72</b>
<b>Chapter 4: Conclusion.....</b>	<b>75</b>
<b>Recommendations Summary .....</b>	<b>76</b>

## EXECUTIVE SUMMARY

In March 2016, the Terrebonne Parish Economic Development Authority (TEDA) retained Garner Economics, LLC to develop an Economic Development Strategy. The focus of this engagement was to help Terrebonne Parish understand how it can leverage its strengths and mitigate challenges to create economic opportunities for its citizens. The resulting plan, ***AN ECONOMIC ENHANCEMENT STRATEGY FOR TERREBONNE PARISH, LOUISIANA***, provides a roadmap that details the product improvement, marketing, and organizational changes the TEDA and the Parish must make to ensure that Terrebonne strengthens its competitive position and is able to attract and retain the types of businesses that will create jobs and opportunities for its population.

Terrebonne Parish, Louisiana



Specifically, the process to build the economic enhancement strategic plan included the following:

- A comprehensive and holistic assessment of key forces driving the economy and its shifting dynamics;
- An Assets and Challenges Assessment (A&C) of Terrebonne from the perspective of a site-location consultant that facilitates investment decisions; and
- A set of implementable recommendations that the leadership in the Parish can take to make Terrebonne Parish a more desirable business location for the identified business targets and to market the Parish as such.

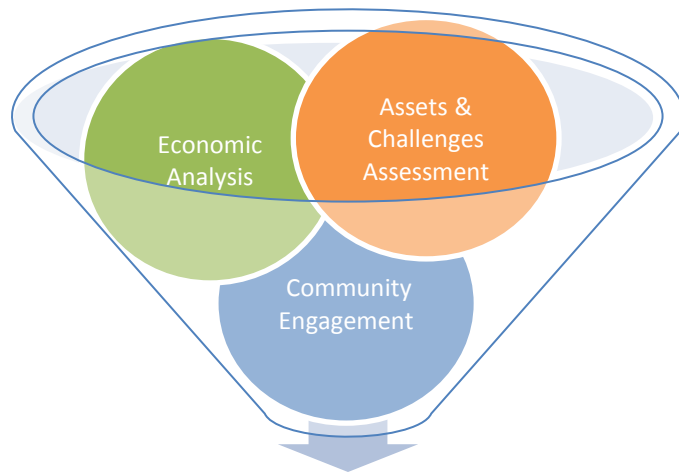
Figure 1 illustrates the process to build the strategy.

FIGURE 1: PROJECT PHASES & METHODOLOGY

Phase I: Discovery	<p>Evaluate Terrebonne Parish’s competitive position from an economic development perspective:</p> <ul style="list-style-type: none"> <li>• Economic and Labor Analysis</li> <li>• Retail Leakage Analysis</li> <li>• Local Specialization, Competitiveness &amp; Growth Assessment</li> <li>• Community Assets and Challenges Assessment (A&amp;C)</li> <li>• Community Engagement Feedback</li> </ul> <p>Compare the Parish to the United States and Louisiana.</p> <p>Prepare the <b>COMPETITIVE REALITIES REPORT</b> (a summary of Phase I).</p>
Phases II and III: Strategy and Implementation Recommendations	<p>Position Terrebonne Parish to achieve success through an actionable strategy, including short- and long-term tactics (5 years) addressing:</p> <ul style="list-style-type: none"> <li>• Business retention and growth</li> <li>• Product improvement initiatives for the Parish</li> <li>• Entrepreneurship</li> <li>• Business recruitment and marketing</li> <li>• Workforce needs</li> </ul> <p>Present the final report.</p>

### Analysis and Assessments

The strategic enhancement plan is a compilation of local and regional facts and data points. Combined with the A&C, a Community Engagement process; an Economic and Labor Analysis; a Retail Leakage Analysis; and a Local Specialization, Competitiveness & Growth Assessment, this process informed the work to identify target business sectors for the Parish. These “building blocks” also are the basis upon which the strategic recommendations were built. The assessments and their key findings are presented in greater detail in Chapter 1.



**An Economic Enhancement Strategy for Terrebonne Parish, Louisiana**

### Target Business Sectors

The above analysis revealed that Terrebonne Parish has many assets upon which to build. The Target Business Sector analysis provides the rationale for six target business sectors for the Parish that will diversify the Parish’s economic base, as well as build on current areas of strengths. These targets are “best fits” for the Parish based on the current economic and business climate conditions and are recommended given its attributes and assets.

The identified target business sectors for the Parish are:

- Food Manufacturing & Related Services
- Coastal Restoration
- Health Services
- Energy & Marine Production Support Services
- Aviation & Avionics
- Professional Services

### Recommendations

In conducting this analysis, the team found that Terrebonne Parish has many assets to build upon and has the opportunity to set itself apart as a competitive place for several types of industries beyond its traditional strengths. The result is a set of implementable recommendations that will help Terrebonne better focus its economic development service delivery to attract identified business targets and be better positioned for the next wave of economic growth. They reflect items Terrebonne should undertake to mitigate negative perceptions of the Parish by site-location advisors or companies looking to invest in the Parish, as well as tactics TEDA can use to effectively market the Parish to the recommended business targets.

The strategic recommendations are broken into three categories and noted in Figure 2:

1. Policy changes and investments that should be made to strengthen the Parish’s product;
2. Improved economic development service delivery; and,
3. Tactics to better market the region.

The resulting recommendations identify areas where TEDA can act as a catalyst to lead initiatives to improve the area’s economic development service delivery and initiatives for which TEDA will serve as a facilitator or participant to improve the overall business climate. By taking steps to balance its economy and better highlight its unique advantages, Terrebonne Parish can shape its economic future and ensure that there are sufficient economic opportunities for its residents.

**FIGURE 2: RECOMMENDATIONS**

Recommendations	
Enhance the Product	Execute Effectively
<ol style="list-style-type: none"> <li>1. Create a culture, programs, and support infrastructure for entrepreneurship</li> <li>2. Establish an Airframe and Power Plant (A&amp;P) certificate program</li> <li>3. Develop hangar facilities to attract MROs and aircraft assembly operations</li> <li>4. Create a plan to improve gateways into the Parish</li> <li>5. Create sales tax allocation districts or utilize tax increment financing more effectively</li> </ol>	<ol style="list-style-type: none"> <li>1. Create a one-stop permitting office to streamline the permitting process</li> <li>2. Develop a realistic and sustainable incentive policy for the Parish</li> <li>3. Create a Project Opportunity Fund (deal closing fund)</li> <li>4. Conduct a capital campaign feasibility analysis for TEDA</li> </ol>
Tell the Story	
<ol style="list-style-type: none"> <li>1. Enhance the TEDA website</li> <li>2. Modify the Parish “Bayou Country” brand specifically for TEDA</li> <li>3. Enhance the Parish’s marketing collateral, media, and public relations efforts</li> <li>4. Actively solicit and provide information to site-location consultants</li> <li>5. Develop a Terrebonne community pride campaign</li> <li>6. Create a cadre of TEDA Ambassadors to extend the Parish’s brand</li> </ol>	

## CHAPTER 1: WHERE TERREBONNE PARISH STANDS AS A PLACE FOR BUSINESS

### A Summary of the *Competitive Realities Report*

This chapter summarizes the team’s findings in the discovery phase of the assignment. A more detailed discussion of the following information was presented to TEDA as a **COMPETITIVE REALITIES REPORT** in July 2016. The **COMPETITIVE REALITIES REPORT** is an objective and subjective evaluation of where Terrebonne Parish stands as a place for business. To build the report, the team collected data, conducted on-site visits, and solicited opinions and feedback from the Parish’s stakeholders from a site-selection perspective. The team used the same criteria and measures that potential companies looking to invest or expand in the Parish would employ. Additionally, the Terrebonne Parish’s economic position was compared against the state of Louisiana and the United States. Three primary vehicles were used to make the assessment: an Asset and Challenges Assessment; a Labor, Demographics and Economic Analysis; and research comprised of a series of focus groups and an electronic survey.

In addition to informing the targeting and recommendations phases of the project, having a solid sense of where Terrebonne Parish stands allows TEDA to recognize the Parish’s strengths so they can be marketed and identify gaps in the Parish’s product so it can take steps to mitigate those gaps and nurture a more attractive business climate.

### *What Stakeholders Think*

As a complement to the assessment of the physical and regulatory structure of Terrebonne Parish, Garner Economics conducted three focus groups with key community stakeholders and conducted an online survey to solicit a variety of perceptions of the Parish’s business climate, stakeholders’ thoughts on the area’s attractiveness to companies, the types of companies that would be a good fit for the region, and areas the

community could or should work to improve. Thirty-nine people participated in the focus groups, which were organized into the following categories: *Large Employers; Small Businesses and Entrepreneurs; and Government & Academia*. The focus groups were held May 18, 2016. The survey was based on feedback received from the focus groups and was in the field May 31–June 14, 2016. One hundred-thirty people completed the survey.

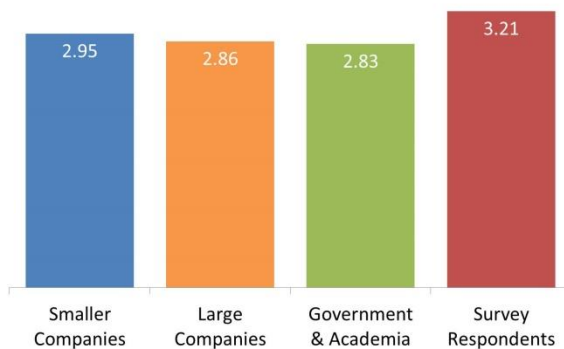
Such community input is a vital part of the strategic planning process. In addition to providing a context around the data accumulated in Phase I of the project, the feedback from stakeholders in the community provides a way to validate conclusions. Similarly, the input often raises issues or nuances that are critical to understanding the community; these insights may or may not be discernible through desktop research.

The following key themes emerged from the discussions and the survey. As noted in the **COMPETITIVE REALITIES REPORT**, the comments from focus group participants and survey respondents may not necessarily be statements of fact, but represent opinions or perceptions.

- Both the focus group participants and survey respondents noted the Parish’s friendliness and resiliency as assets. Other assets noted included its culinary strengths, its location and proximity to other communities and the state’s metropolitan areas, and its recreational/water assets. Several noted the medical expertise in the Parish and the technical and higher education institutes. The Cardiovascular Institute of the South and the coastal restoration programs at Nicholls State University (NSU) and Fletcher Technical Community College were frequently mentioned (though NSU is not in the Parish proper).

- Conversely, focus group participants and survey respondents noted that the high cost of insurance, government bureaucracy and taxes, the inefficient and aging road system, and aging infrastructure are deterrents to investment in the area. A perceived lack of employment opportunities, amenities for young professionals, and a perceived inertia among decision makers were noted as characteristics that hold back the area. Another often mentioned challenge is the region’s inability to attract and retain trailing spouses, young professionals, and other talent. Participants and respondents noted that attention to the Parish’s soft infrastructure—for example, broadband connectivity, parks, trails, and other local recreation facilities—would help make Terrebonne Parish more attractive to these groups.
- Related to this, participants and respondents suggested that the Parish could do more to develop the area’s infrastructure (i.e., transportation assets, the local road network, and/or fully leveraging waterway and rail connections).
- Focus group participants and survey respondents scored the Parish as average in terms of the business climate in the Parish, with business climate defined as those policies and laws enacted by the local government that impact local businesses.

FIGURE 1.1: BUSINESS CLIMATE RANKING



- When asked to comment on the current labor situation in the Parish, focus group participants and survey respondents noted that there is a large supply of certain workers given the depressed condition of their given industry (*Oil and Gas* and *Shipbuilding*). Similar to many areas in the country, both groups noted that it is often difficult to find both entry-level workers and workers with trade skills. Focus group participants noted that the area is making some progress in this arena through work to re-train and train workers through Fletcher Technical Community College and Nicholls State University (NSU) in partnership with the high schools.
- Because an essential part of this strategy is the identification of target industries that TEDA should work to attract, the team solicited the focus group and survey participants’ feedback on the types of industries that would be a good fit for the region. Industries most frequently mentioned included distribution and logistics; heavy manufacturing; food (especially seafood) processing, storage, refrigeration, and distribution; marine-based (including coastal restoration); aviation-based—either aircraft or unmanned aerial vehicles (to leverage the airport); and boat maintenance. The feedback also included suggestions to diversify the region away from *Oil and Gas*.
- When asked what the Parish can do to make itself more competitive, focus group participants and survey respondents suggested that effort be devoted to building amenities that would attract and retain talent and that the region work together to strengthen the environment (e.g., coastal restoration) and modernize its infrastructure. The stakeholders would also like to see continued cooperation between industry and higher educational institutions to improve training and skills development and to nurture entrepreneurship.



Figures 1.2–1.6 highlight the feedback in terms of the overall competitive position of Terrebonne Parish. A detailed summary of the community engagement input was provided in the **COMPETITIVE REALITIES REPORT**.

**FIGURE 1.2: PERCEIVED STRENGTHS**

*When asked to name Terrebonne Parish’s strengths, focus group participants and survey respondents responded as follows:*

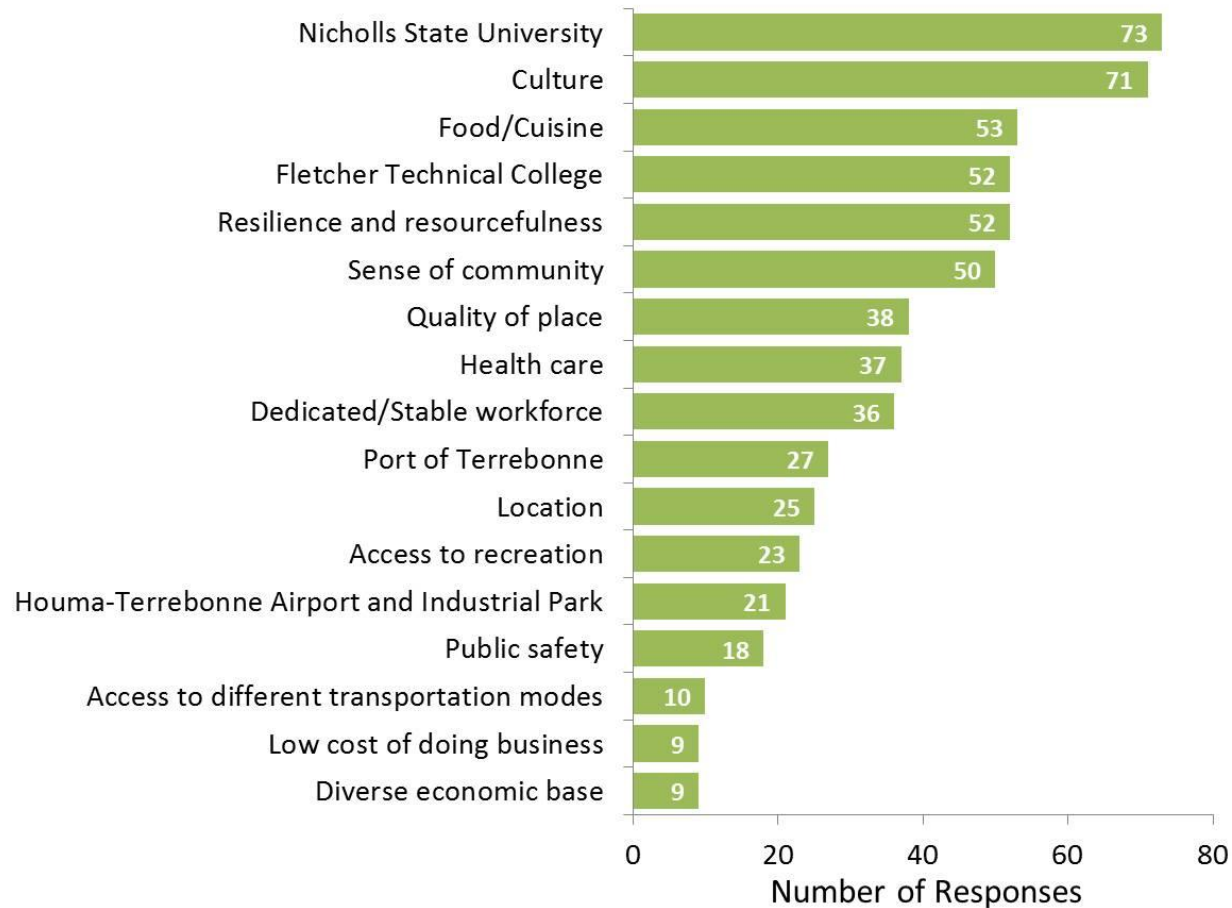
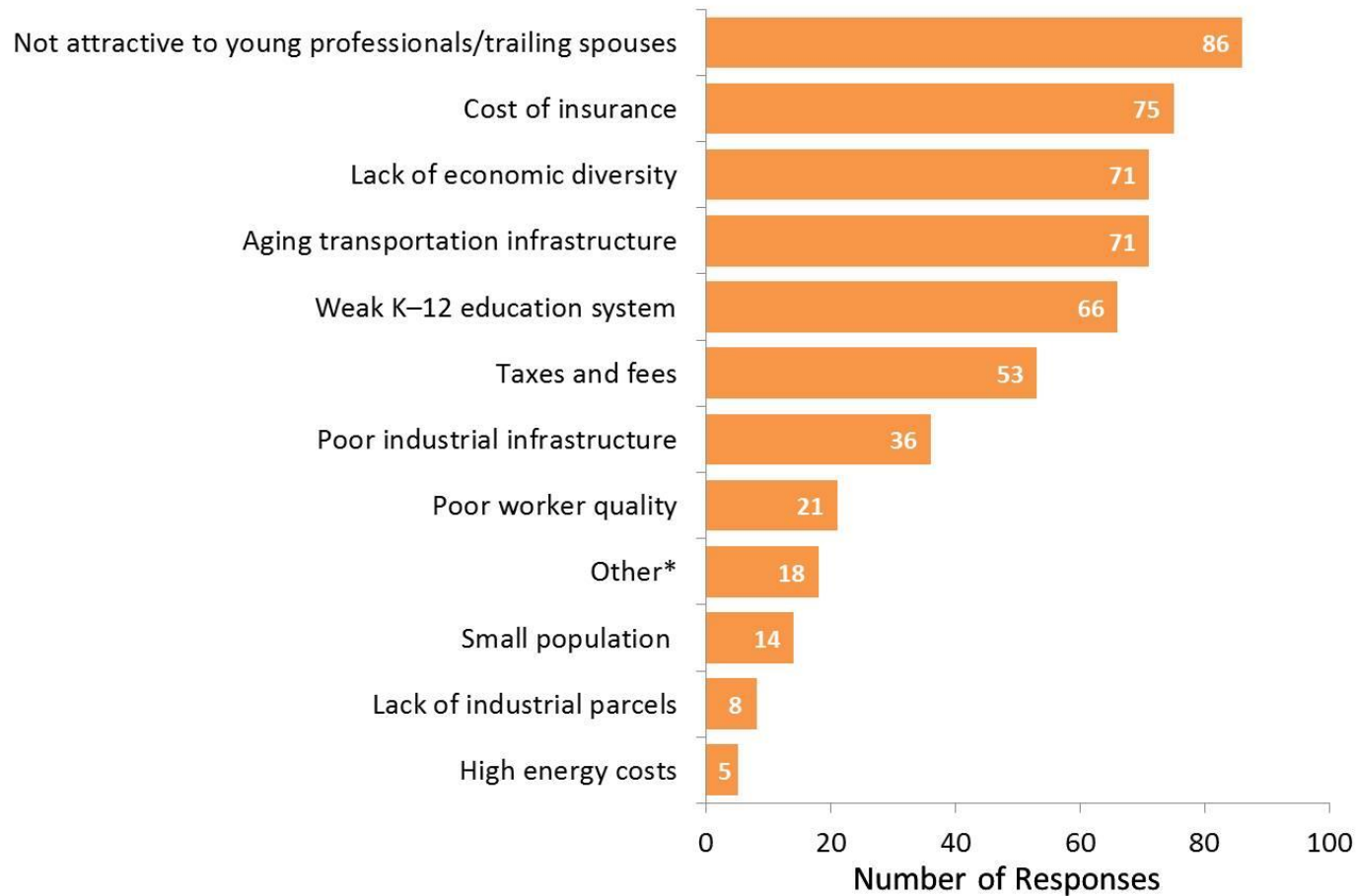






FIGURE 1.3: PERCEIVED INHIBITORS

*When asked to indicate issues that inhibit Terrebonne Parish/TEDA from recruiting businesses, the two groups responded as follows:*



\*“Other” responses provided include: not enough green space and more recreational activities, bureaucracy and taxes, lack of cultural experiences, high cost of housing and real estate, federal regulations, water and air pollution, little oversight of government functions and services.

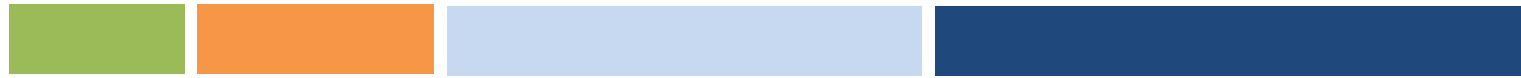


FIGURE 1.4: TARGET BUSINESS SECTORS

*When asked what types of business sectors would be a good fit for the Parish, the two groups responded as follows:*

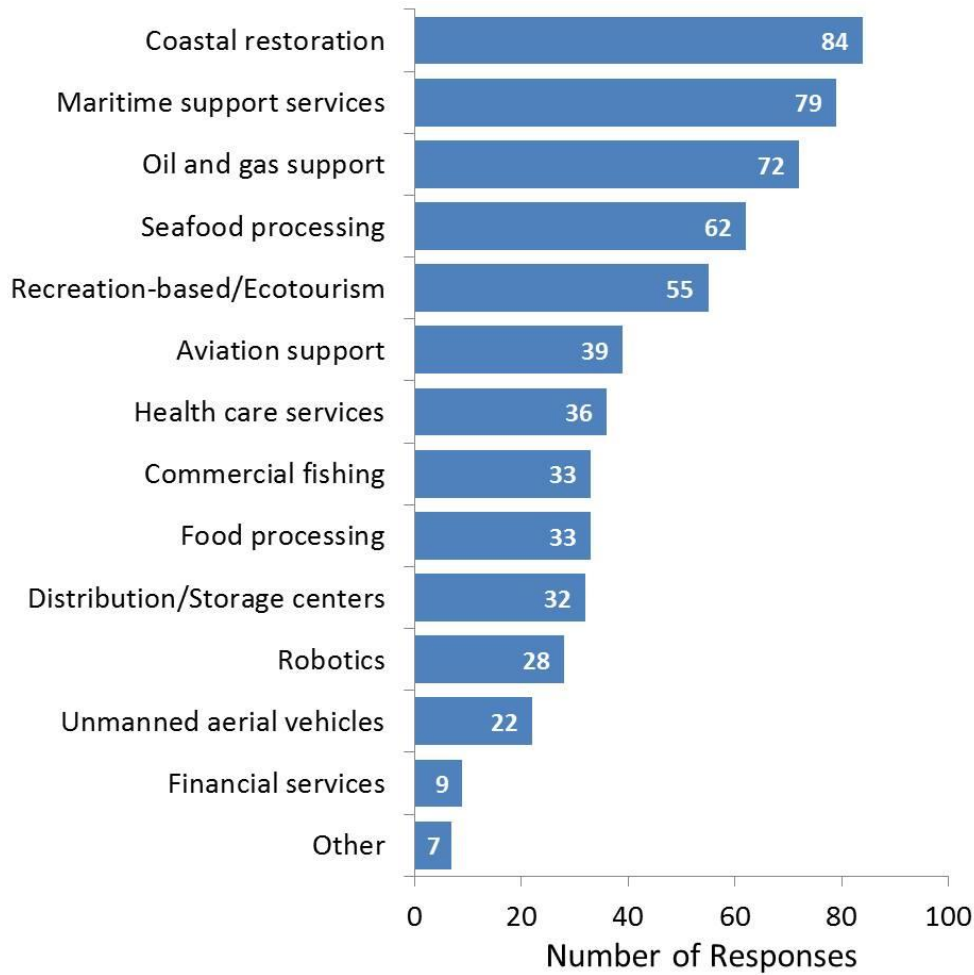
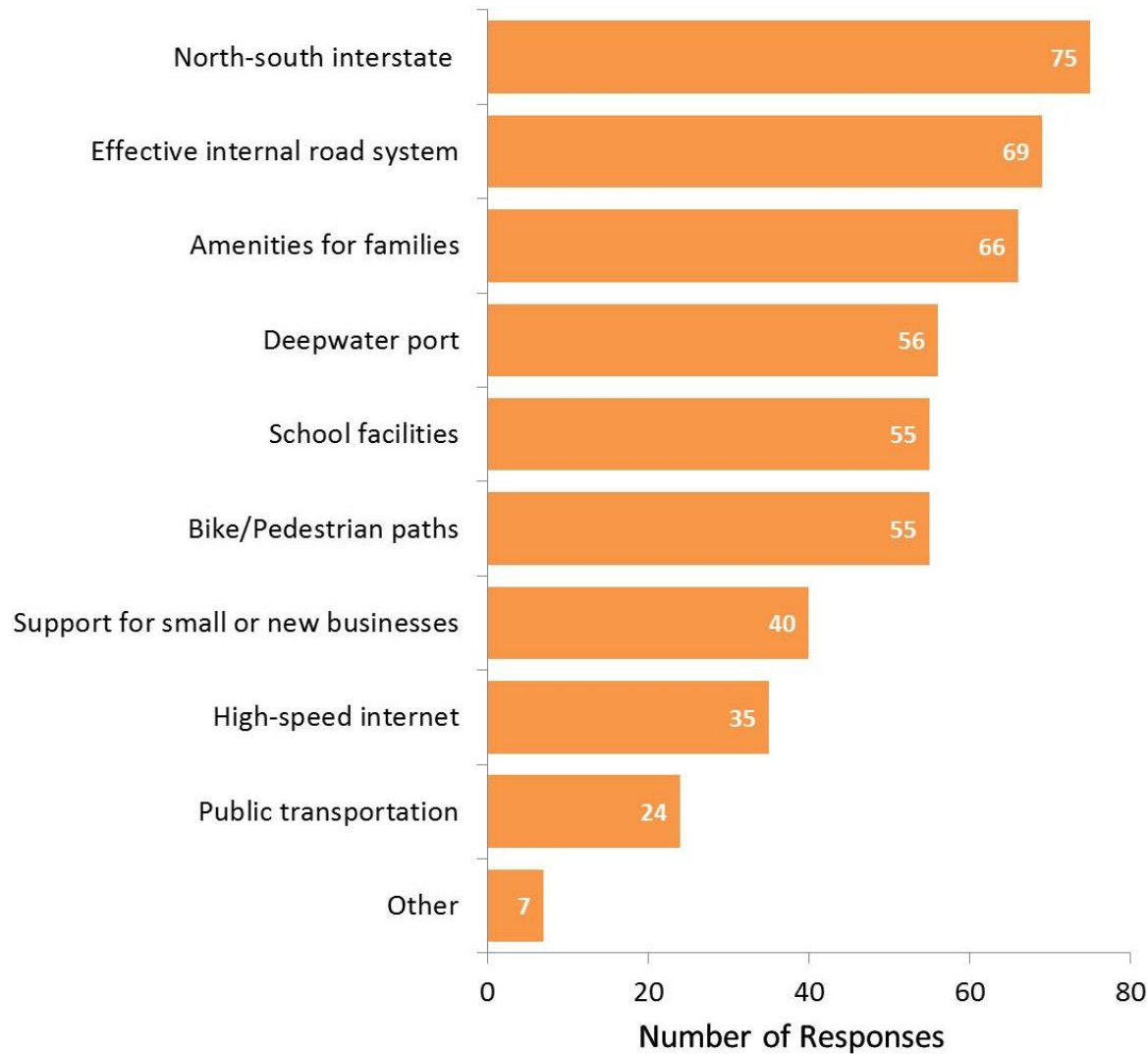




FIGURE 1.5: LACKING INFRASTRUCTURE

*When asked what hard or soft infrastructure\* is weak or missing in Terrebonne Parish, the survey respondents and focus group participants ranked the items as follows:*



\*Hard infrastructure was defined as the physical networks such as roadways, sewer, broadband internet, airports, and/or ports. Soft infrastructure was defined as institutions or places that support the economic, health, and cultural climate of a place, such as the education system, the health care system, system of government, and/or parks.



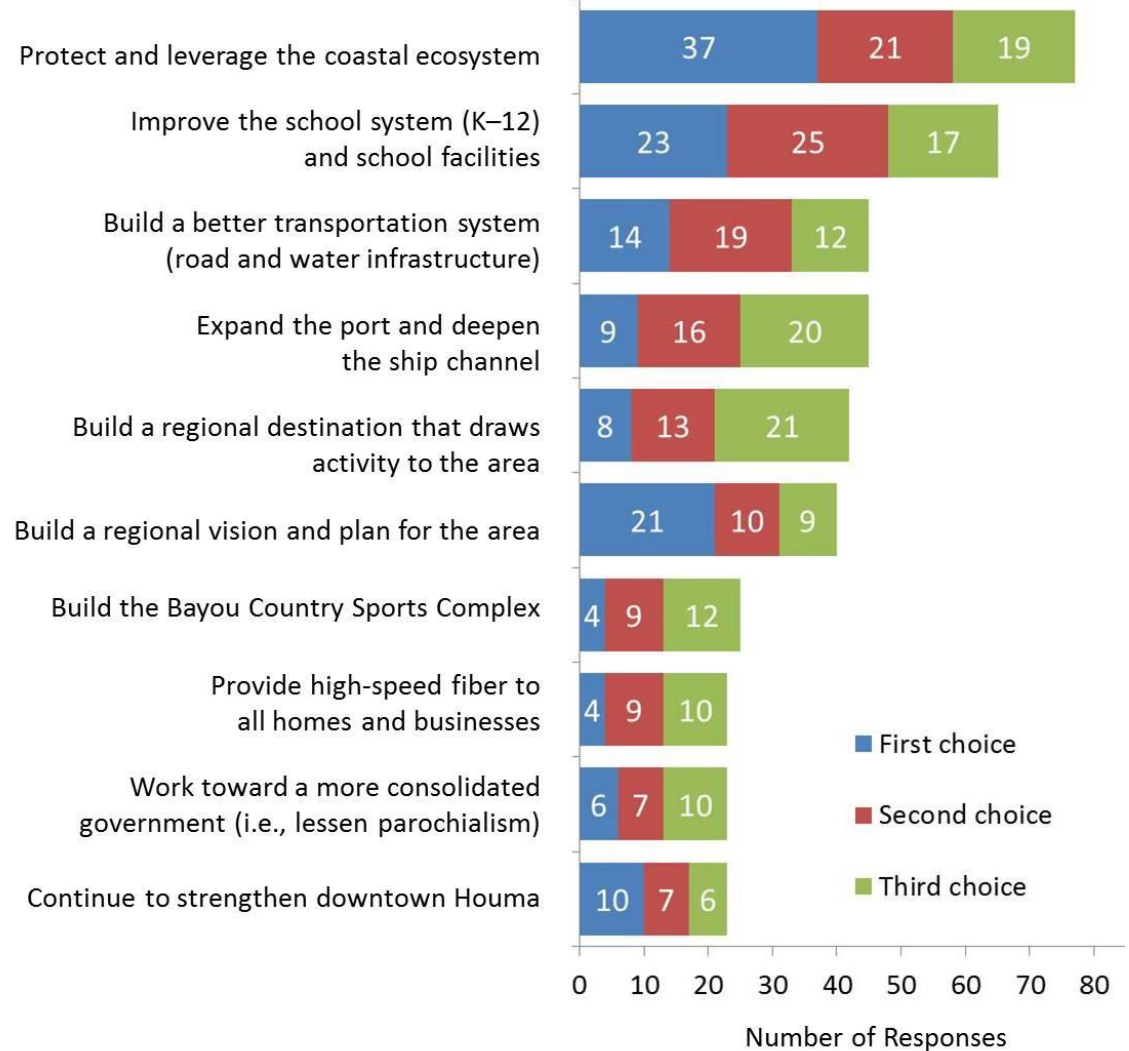
FIGURE 1.6: PRIORITIES TO STRENGTHEN TERREBONNE PARISH’S COMPETITIVE POSITION AS A PLACE FOR BUSINESSES AND TALENT

*When asked to indicate the top items they would like to see the Parish leadership take on to strengthen Terrebonne’s ability to attract and retain quality companies and talent to Terrebonne—without worrying about money or politics—the two groups responded as follows:*

**Responses given by focus groups:**

- Recapture the coastline and build a cluster around coastal restoration
- Grow in a holistic, smart way; anticipate needs and build them
- Diversify the economy
- Improve the local road network
- Create a destination that gives people a reason to want to come here (e.g., execute Bayou Country Sports Park)
- Reduce the fees and taxes businesses need to pay; ease operating costs
- Create a business incubation environment
- Leverage the airport
- Bring rail back to the entire Parish
- Learn to work together regionally
- Fix and develop downtown
- Work toward a consolidated form of government and remove parochialism

**Most frequently noted by survey respondents:**






### *Assets and Challenges Assessment*

Grounded by decades of economic development, site-location analysis, and industry cluster targeting experience, Garner Economics began the project to assess Terrebonne Parish by using a rigorous set of techniques based on fully sourced and reliable datasets to completely understand the Parish's current economic state. The main component of this phase was the **ASSETS AND CHALLENGES ASSESSMENT (A&C)**, which is a compilation of local facts and data points with quantitative analysis and some subjective opinions. These are typically the same variables that are used when we conduct a locational assessment on behalf of a corporate client.

Garner Economics analyzed 56 community factors as part of the assessment. Ratings evaluate Terrebonne Parish against the state of Louisiana and the United States. Of the 56 variables analyzed, 19 are considered an asset and 11 a challenge (26 rated as neutral). The combination of neutral and challenge ratings may define the Parish as average, which is a rating that may stymie it in competing globally over time. The goal in the future will be for those policymakers engaged in local economic development to move the bar with the neutral rankings from neutral to an asset and the challenge ranking to neutral (or better).




To enable a summary overview of the report's main findings for readers, a set of dashboard icons is presented. Each finding has an accompanying icon to assist with interpretation. The complete **ASSETS AND CHALLENGES ASSESSMENT (A&C)** was included in the **COMPETITIVE REALITIES REPORT**. The tables on the following pages summarize the assessment.

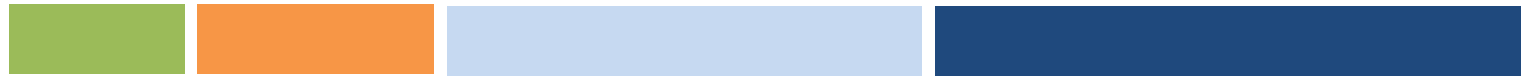
#### **REPORT DASHBOARD**




-  Indicates the Parish is better (more positive) compared to a majority of the benchmark geographies or points to a positive trend or asset within the area.
-  Indicates the Parish is neutral or normal, neither positive nor negative. Indicator may represent an observation or be in the middle of the benchmark geographies.
-  Indicates the Parish is worse compared to a majority of the benchmark geographies or points to a negative trend or challenge within the area.

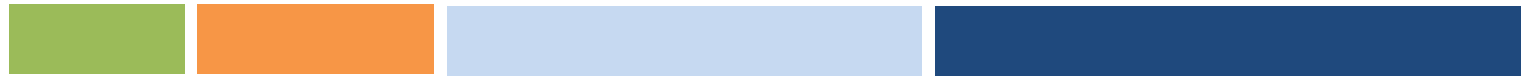
**FIGURE 1.7: TERREBONNE PARISH'S ASSETS AND CHALLENGES**




Detailed data and rationale for the ratings can be found in the *COMPETITIVE REALITIES REPORT*.

	 Assets	 Challenges	 Neutral
Access to Markets	<ul style="list-style-type: none"> <li>• Port facilities (inland and/or water)</li> <li>• General aviation airport capable of handling corporate aircraft</li> </ul>	<ul style="list-style-type: none"> <li>• Not centrally located for national market</li> <li>• Lack of Interstate highways</li> </ul>	<ul style="list-style-type: none"> <li>• Centrally located for major regional market</li> <li>• Well positioned to serve international markets</li> <li>• Rail service</li> <li>• Within one hour of commercial air passenger service</li> <li>• Broadband availability and speeds</li> </ul>
Labor	<ul style="list-style-type: none"> <li>• Availability of skilled industrial workers</li> <li>• Quality of labor-management relations</li> <li>• Availability of post-secondary vocational training</li> <li>• Availability of on-the-job training assistance</li> <li>• Within ½ hour of four-year university/college</li> </ul>	<ul style="list-style-type: none"> <li>• Cost of labor</li> <li>• Lack of availability of engineering program (locally)</li> </ul>	<ul style="list-style-type: none"> <li>• Availability of skilled clerical workers</li> <li>• Availability of technicians and scientists</li> <li>• Availability of managerial personnel</li> </ul>
Access to Resources	<ul style="list-style-type: none"> <li>• Availability of aquaculture products for food processing</li> <li>• Availability of manufacturing processes</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of availability of business and professional services</li> </ul>	<ul style="list-style-type: none"> <li>• Availability of agricultural products for food processing</li> </ul>

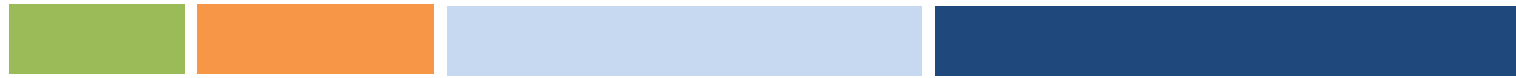


	 Assets	 Challenges	 Neutral
<b>Economic Development Program</b>	No relative Assets; see Challenges and Neutral rankings	<ul style="list-style-type: none"> <li>Lack of involvement of both public and private sectors</li> </ul>	<ul style="list-style-type: none"> <li>Level of professional staff</li> <li>Local economic development organization strategic plan</li> <li>Cooperation between various organizations involved in economic development activity</li> <li>Awareness of community regarding economic development</li> <li>Funding for local economic development program</li> </ul>
<b>Access to Space</b>	No relative Assets; see Challenges rankings	<ul style="list-style-type: none"> <li>Lack of fully served and attractive industrial sites and space</li> <li>Lack of fully served and attractive office sites and space</li> </ul>	
<b>Access to Capital</b>	No relative Assets; see Challenges and Neutral rankings	<ul style="list-style-type: none"> <li>Lack of venture capital from local sources for business startups or early-stage funding</li> </ul>	<ul style="list-style-type: none"> <li>Availability of tax credits and incentives</li> <li>Availability of low-interest loans for small business</li> </ul>
<b>Government Impact on Business</b>	<ul style="list-style-type: none"> <li>Availability/capacity of water and wastewater treatment</li> <li>Availability of labor training incentives</li> <li>Quality of post-secondary education</li> <li>Local property taxes</li> </ul>	<ul style="list-style-type: none"> <li>Condition and maintenance of local streets</li> </ul>	<ul style="list-style-type: none"> <li>Availability and type of local incentives</li> <li>Public secondary school performance (ACT scores)</li> </ul>



	 Assets	 Challenges	 Neutral
<p>Quality of Place</p>	<ul style="list-style-type: none"> <li>• Availability of executive-level housing</li> <li>• Availability of moderate-cost housing</li> <li>• Availability of apartments</li> <li>• Cost-of-living index</li> <li>• Level of cultural activity</li> <li>• Availability of adequate medical facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Level of crime</li> <li>• Climate and natural disaster risk</li> </ul>	<ul style="list-style-type: none"> <li>• Availability of recreational opportunities</li> <li>• Level of air pollution</li> <li>• General appearance of the community</li> <li>• Availability of major shopping facilities</li> <li>• Availability of first-class hotels, motels, and resorts (AAA-rated, three-diamond or higher)</li> <li>• Diversity of local restaurants</li> <li>• Appearance of the Central Business District</li> </ul>





*Economic, Demographic, Retail, and Labor Trends*

In addition to assessing Terrebonne Parish against criteria and measures employed by site selectors, work during Phase I examined the area’s economic position in the state of Louisiana and the United States. Terrebonne Parish must compete with other geographies to attract investment and talent; hence, it is important to know how it compares.

Garner Economics used data that can be verified and, for which, comparisons with other cities or areas can be made at the level of detail

preferred by most site-selection professionals. The most detailed demographics data, industry statistics, and comparative rankings were used because businesses considering Terrebonne Parish will do the same.

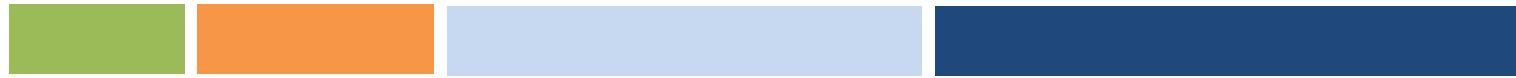
The scorecards presented below were included in the **COMPETITIVE REALITIES REPORT**.

<b>Demographic &amp; Labor Dynamics</b>		
<b>Population Growth</b>		Terrebonne Parish had a population of 113,972 in 2015, adding over 2,400 (2.2 percent) since 2010 and 6,161 (5.7 percent) since 2005. Terrebonne grew more than the state of Louisiana and less than the nation as a whole in the last decade.
<b>Age</b>		Overall, the age distribution in Terrebonne Parish closely mirrors the state and nation, with the exception of a higher population of children under the age of 15 in the Parish.
		Median age for Terrebonne Parish is younger than the state and nation for both 2010 and 2014, at 35 years and 35.4 years respectively.
		In the past decade, the trend of an aging population in Terrebonne Parish is fairly pronounced.
<b>New Residents</b>		Newcomers to Terrebonne Parish have a younger median age than the existing population, and individuals 25 to 34 years old were the largest group of new residents.
<b>Educational Attainment</b>		Educational attainment for Terrebonne Parish population ages 25+ is lower than all other geographies, with higher percentages of those <i>High School Graduate</i> and under.



**Demographic & Labor Dynamics, continued**

Secondary School Performance		Terrebonne Parish experienced lower average ACT scores than the state and the nation; however, the 19.2 average score for the Parish is just below Louisiana’s 19.4 average score. Terrebonne Parish increased its average ACT score 1.3 points over the 2014 score of 17.9.
		The average four-year graduation rate in Terrebonne Parish is 75.9, dropping 0.1 point from 2014.
Crime		Terrebonne Parish had a higher property crime rate than the state and nation, and a violent crime rate higher than the nation and lower than Louisiana. Crime rate trends are improving with decreasing violent and property crime rates.
Labor Force Participation		Among residents ages 16 and over in Terrebonne Parish, labor force participation is 60.1 percent. This rate is down from 61 percent in 2009 and is on par with the state, but lower than the national rate.
Worker Flows		Median travel time to work in Terrebonne Parish is 24 minutes.
		Commuter inflow/outflow is balanced with 26,382 people living and working within Terrebonne Parish for their primary job; 26,662 people commuting into the Parish for employment; and 18,408 Terrebonne Parish residents commuting out of the Parish for work.
Unionization		Unionization is low for the southern Louisiana areas, measured with a total of 4.9 percent of workers belonging to a union. This is below the state and nation unionization rates of 5.2 percent and 11.1 percent of total union membership of private and public workforce.



<i>Economic Dynamics</i>		
Weekly Wage		Wages are strong, with Terrebonne’s average weekly wage 14 percent above the state and 1 percent above the nation. Over the last decade, the estimated average weekly wage in Terrebonne Parish increased \$329 or 52 percent.
Self-Employment		The self-employment rate is under the percentage of <i>Self-Employed</i> in Louisiana and the nation, declining more sharply than the benchmarks. The current percentage of those who are <i>Self-Employed</i> is 8.4 percent, falling from 10.3 percent.
Startup Firms		Startup creation is declining in the Houma-Thibodaux MSA, both in total number of new firms as well as the startup rate per 100,000 residents. The number of startup firms relative to population in Houma-Thibodaux MSA was above the state and equal to the nation in 2009 but has experienced a sharper decline in recent years.
Household Income		Terrebonne Parish has a median household income of \$49,932, consistently higher than Louisiana but below the nation.
Per Capita Income		Per capita income in Terrebonne Parish was \$23,999, which is below the state and nation for the same period.
Poverty		Poverty is higher than the national rate and lower than the state’s rate for <i>All Individuals</i> (18.1 percent) and <i>Children Under 18</i> (26 percent).
Cost of Living		Cost of living is 94, lower than the national average of 100. All categories measured for cost of living also rank under 100.
Broadband		Access to DSL (89.3 percent of households) and cable (99.4 percent of households) is strong. Households with access to two or more wireline providers is 91.6 percent as well. Download and upload speed tests for <i>Medium &amp; Large Businesses</i> were well below the state and nation; <i>Small Business</i> speeds were faster than the state but lower than the national average.



### Local Specialization, Competitiveness & Growth

Below are general observations from an in-depth analysis of industry sectors and occupational groups in Terrebonne Parish. This information is not benchmarked.

<p><b>Major Industry Sector Change</b></p>	<ul style="list-style-type: none"> <li>✓ Over the last five years, the top absolute job growth in Terrebonne Parish came from <i>Manufacturing</i> (+1,532 jobs/25 percent), <i>Health Care &amp; Social Assistance</i> (+1,147 jobs/20 percent), and <i>Transportation &amp; Warehousing</i> (+1,143 jobs/36 percent).</li> <li>✓ Other significant gains were made in <i>Professional, Scientific &amp; Technical Services</i> (+695 jobs/33 percent); <i>Accommodation &amp; Food Services</i> (+591 jobs/13 percent); <i>Wholesale Trade</i> (+173 jobs/9 percent); and <i>Educational Services</i> (+142 jobs/88 percent).</li> <li>✓ There were job losses in nine sectors; however, significant job losses occurred in the following sectors: <i>Government</i> (-1,597 jobs/21 percent); <i>Other Services</i> (-363 jobs/10 percent); <i>Mining, Quarrying, and Oil &amp; Gas Extraction</i> (-356 jobs/8 percent); and <i>Construction</i> (-284 jobs/7 percent).</li> </ul>
<p><b>Industry Earnings</b></p>	<ul style="list-style-type: none"> <li>✓ Nearly half of industry sector earnings were above state and national same-industry averages.</li> <li>✓ Average annual earnings for <i>Transportation &amp; Warehousing</i> (\$77,302) are 55 percent above the national average and 25 percent above the state.</li> <li>✓ Two industry sectors in Terrebonne Parish have wages that are less than half as much as national averages: <i>Information</i> (\$40,161/55 percent lower) and <i>Management of Companies &amp; Enterprises</i> (\$56,823/51 percent lower).</li> <li>✓ The <i>All Industry</i> average salary for Terrebonne Parish is \$50,043, 1 percent above the national average wage and 14 percent above the state average wage.</li> </ul>
<p><b>Major Occupational Change</b></p>	<ul style="list-style-type: none"> <li>✓ Over the last five years, the largest absolute occupational gains in Terrebonne Parish came from <i>Production</i> occupations (+1,032 jobs/13 percent).</li> <li>✓ Gains were also seen in the occupational groups of <i>Transportation &amp; Material Moving</i> (+715 jobs/13 percent) and <i>Food Preparation &amp; Serving Related</i> occupations (+411 jobs/9 percent).</li> <li>✓ The greatest job losses were in the occupational area of <i>Construction &amp; Extraction</i> (-378 jobs/7 percent).</li> </ul>

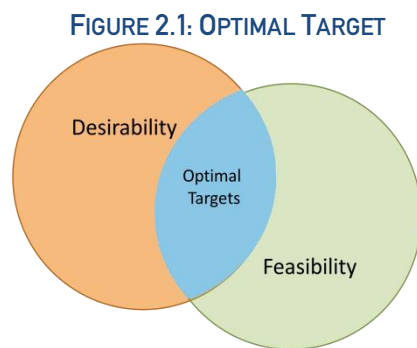
## CHAPTER 2: OPTIMAL TARGETS FOR TERREBONNE PARISH



The optimal business sectors target selection is based on the specific characteristics of the economy of Terrebonne Parish. These recommended targets are designed to assist economic development groups in the region to prioritize resources by focusing on industry sectors for which the region holds competitive advantages and/or has significant growth potential. This approach will help policymakers prioritize the region's community and economic development strategy.

Garner Economics uses a desirability and feasibility screening matrix to determine the optimal targets. Desirability begins with considering the types of business sectors the community would like to see in the Parish (Figure 2.1). Feasibility includes what the area can actually achieve in the short- to mid-term, based on current or planned locational assets and in conducting an analytical review of the regional economy.

Using results from the previously completed **COMPETITIVE REALITIES REPORT**, the Assets and Challenges Assessment, focus groups, and field visits, six business and industry groups were chosen that best match Terrebonne Parish's unique competitive advantages to the needs of particular industry sectors. The optimal targets include many economic sectors that are in the midst of significant transformations and are, therefore, most likely to have increased interest in adding, growing, or moving operational sites. For each target, Terrebonne Parish has a competitive advantage in the marketplace. Some targets are



already established in the area and are positioned for additional growth; for others, there are opportunities to leverage the region's assets in order to either attract existing businesses or to encourage entrepreneurs to start new ventures. For all targeted businesses, the Parish's competitive advantages are presented, along with national trends and projections of the targets. In some cases, target sectors are actually losing jobs nationally, but the Parish's particular set of economic development assets put it in position to capture demand.

The target information is presented in a practical and workable format, avoiding complex analysis and extensive projections of future outcomes. Instead, the justifications for the targets should be clearly apparent and make sense to practitioners and community leaders. Under each major target, a list of individual subsectors is provided with accompanying NAICS classifications. A full description for each subsector target can be found in Table 2.19. Detailed subsector targets help to bridge the gap from broad economic concepts to a workable means for identifying specific prospective industries and firms.

For each target, a bulleted list of rationales is presented and identified as appealing to the needs of prospects (P) or the community (C). This material can be used in marketing and community support efforts or to help economic development personnel prioritize targeting efforts.

One of the targets is centered on the *Oil and Gas* industry, which has long formed the core of the Parish's economy, but is perpetually subject to the volatile global energy marketplace. While this industry will remain a key component of the regional economy, it is important for the Parish to plan for its boom and bust cycles. The *Transferability of Skills for the Oil & Gas Industry* section at the end of this chapter demonstrates how the skills of workers in leading occupations from this industry can be adapted to other industries.

FIGURE 2.2: OPTIMAL TARGETS FOR TERREBONNE PARISH

Food Manufacturing & Related Services	Energy and Marine Production & Support Services	Coastal Restoration	Aviation & Avionics	Health Services	Professional Services
<b>Major Subsectors</b>					
<ul style="list-style-type: none"> <li>• Soybean, Rice &amp; Sugar Processing</li> <li>• Seafood Product Preparation &amp; Packaging</li> <li>• Fertilizer, Pesticide &amp; Agricultural Chemical Mfg.</li> <li>• Food Product Machinery Mfg.</li> <li>• Fish &amp; Seafood Merchant Wholesalers</li> <li>• Grain &amp; Field Bean Merchant Wholesalers</li> <li>• Fish &amp; Seafood Markets</li> <li>• Wholesalers of Industrial Machinery</li> <li>• Refrigerated Warehousing &amp; Storage</li> <li>• Special Food Services</li> </ul>	<ul style="list-style-type: none"> <li>• Ship Building &amp; Repairing</li> <li>• Boat Building</li> <li>• Water Freight Transportation</li> <li>• Long-Distance Freight Trucking</li> <li>• Port &amp; Cargo Operations</li> <li>• Support Services for Water Transportation</li> <li>• Freight Transportation Arrangement</li> <li>• Packing &amp; Crafting</li> <li>• Commercial &amp; Industrial Machinery Repair &amp; Maintenance</li> <li>• Oil &amp; Gas Extraction</li> <li>• Drilling Oil &amp; Gas Wells</li> <li>• Support Activities for Oil &amp; Gas Operations</li> <li>• Oil &amp; Gas Pipeline and Related Structures Construction</li> </ul>	<ul style="list-style-type: none"> <li>• Engineering Services</li> <li>• Surveying &amp; Mapping Services</li> <li>• Environmental Consulting Services</li> <li>• Other Scientific &amp; Technical Consulting Services</li> <li>• Heavy &amp; Civil Engineering Construction</li> <li>• Remediation Services</li> </ul>	<ul style="list-style-type: none"> <li>• Navigation &amp; Aeronautical System Mfg.</li> <li>• Aircraft Mfg.</li> <li>• Aircraft Maintenance &amp; Repair Operations (MROs)</li> <li>• Aircraft Engine &amp; Parts Mfg.</li> <li>• Other Aircraft Parts &amp; Auxiliary Equipment Mfg.</li> <li>• Transportation Equipment &amp; Supplies Merchant Wholesalers</li> <li>• Nonscheduled Air Transportation</li> <li>• Support Activities for Air Transportation</li> </ul>	<ul style="list-style-type: none"> <li>• Offices of Physicians, Dentists &amp; Other Health Practitioners</li> <li>• Cardiovascular Care &amp; Diabetes Management Professionals</li> <li>• Health Services Educational Institutions</li> <li>• Outpatient Care Centers</li> <li>• Medical &amp; Diagnostic Laboratories</li> <li>• Home Health Care Services</li> <li>• Nursing &amp; Residential Care Facilities</li> </ul>	<ul style="list-style-type: none"> <li>• Accounting &amp; Payroll Services</li> <li>• Management Consulting Services</li> <li>• Corporate, Subsidiary &amp; Regional Management Offices</li> <li>• Office Administrative Services</li> <li>• Business Support Services</li> </ul>

## TARGET 1: FOOD MANUFACTURING & RELATED SERVICES



Terrebonne Parish is one of the leading regions in the United States for the harvesting of shrimp, crawfish, and other aquaculture products. It also has a significant base of soybean, sugar, and rice farming. In spite of its robust food product resources, there is

presently very little food manufacturing activity in the Parish: as of 2016, there are only about 250 jobs in this sector in Terrebonne. This target group must be improved in order to add value to the economy and reinforce the region's agribusiness activity.

The U.S. *Food & Beverage Processing* industry is undergoing a transition, with consumers shifting towards healthy, fresh, organic, local, and ready-to-eat alternatives over traditional products that are mass produced, frozen, canned, etc. Terrebonne Parish's combination of a strong base of aquaculture and agriculture products, ample water and sewer capacity,

and access to major U.S. markets makes it a strong competitor in this arena.

Growth in this target will be bolstered by the presence of the John Folse Culinary Institute at Nicholls State University, which is the only culinary program in the state that offers a bachelor's degree, and just one of four in the United States. This program produces about 50 four-year graduates and another 25 associate graduates per year. Terrebonne's rich history of regional cuisine and proximity to the world-class restaurant scene in New Orleans also makes it a logical location for niche food manufacturers, caterers, and other high-end food services. At the K-12 level, schools in the Parish have access to the Louisiana Restaurant Association's ProStart program, which prepares students for careers in the culinary arts. **For each target, a bulleted list of rationales is presented and identified as appealing to the needs of prospects (P) or the community (C).**

### Rationales

- Centrally located to serve regional and national markets (P)
- Access to four-lane highways, rail service, and port facilities (P)
- General aviation airport capable of handling corporate aircraft (P)
- Availability of skilled industrial workers (P)
- Reasonable availability of managerial personnel (P)
- Quality of labor-management relations (P)
- Availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- John Folse Culinary Institute at Nicholls State (P)
- Availability of locally raised products for food processing (P)
- Availability of manufacturing processes (P)
- Rich history of culinary activity in the surrounding area (P)
- Ample availability of water and sewer infrastructure (P)
- Availability of tax credits, incentives, and low-interest loans (P)
- Availability of labor training incentives (P)
- Low rate of unionization in the local labor market (P)
- Potential to sustain and add value to local base of aquacultural and agricultural activity (C)
- Strong recent growth in regional *Manufacturing* sector (C)
- Average target subsector national earnings of \$76,022 (C)
- Average target subsector 10-year past employment growth rate: 2.5%
- Average target subsector 10-year forecast employment growth rate: 3.8%
- An existing local pool of high-demand occupations (Table 2.2) (P)
- Quality of place assets: availability of all types of housing, low cost of living, cultural activity, recreational opportunities, medical facilities (P)

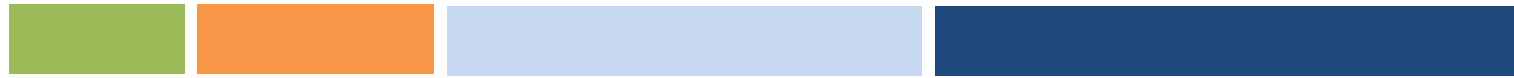


**Table 2.1**  
**Food Manufacturing & Related Services Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
311212	Rice Milling	\$63,234	13.8%	12.0%	0.005
311224	Soybean and Other Oilseed Processing	\$81,800	-40.3%	-41.8%	0.008
311314	Cane Sugar Manufacturing	\$92,264	-14.6%	-9.4%	0.006
311710	Seafood Product Preparation and Packaging	\$55,915	-7.4%	-3.9%	0.038
32531	Fertilizer Manufacturing	\$100,024	-0.4%	-2.4%	0.023
325320	Pesticide and Other Agricultural Chemical Manufacturing	\$115,520	-9.0%	-6.9%	0.014
333241	Food Product Machinery Manufacturing	\$78,035	-0.9%	5.1%	0.018
423830	Industrial Machinery Merchant Wholesalers	\$83,227	-0.8%	3.3%	0.320
424460	Fish and Seafood Merchant Wholesalers	\$55,257	10.1%	11.9%	0.027
424510	Grain and Field Bean Merchant Wholesalers	\$70,246	9.8%	14.5%	0.049
445220	Fish and Seafood Markets	\$33,339	12.7%	10.3%	0.016
493120	Refrigerated Warehousing and Storage	\$54,885	25.9%	8.5%	0.059
311212	Rice Milling	\$63,234	13.8%	12.0%	0.005
<b>Weighted Averages/Totals, without NAICS 7223</b>		<b>\$76,022</b>	<b>2.5%</b>	<b>3.8%</b>	<b>0.581</b>
7223	Special Food Services	\$25,713	12.3%	7.2%	0.753
<b>Weighted Averages/Totals, all subsectors</b>		<b>\$47,636</b>	<b>8.0%</b>	<b>5.7%</b>	<b>1.334</b>

Source: EMSI, Garner Economics

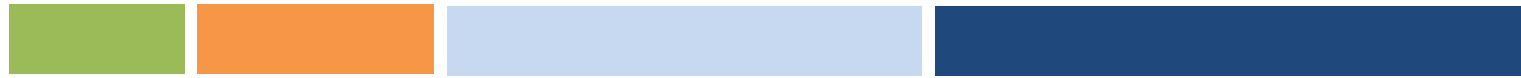




**Table 2.2**  
**Food Manufacturing & Related Services: Terrebonne Parish Existing Labor Pool of High-Demand Occupations–2015**

Occupation	Employed in Terrebonne
Combined Food Preparation and Serving Workers, Including Fast Food	985
General and Operations Managers	941
Laborers and Freight, Stock, and Material Movers, Hand	937
Food Preparation Workers	896
Maintenance and Repair Workers, General	824
First-Line Supervisors of Retail Sales Workers	712
Stock Clerks and Order Fillers	625
Sales Representatives, Wholesale and Manufacturing, Except Tech./Sci. Products	597
First-Line Supervisors of Food Preparation and Serving Workers	497
Industrial Machinery Mechanics	430
Cooks, Institution and Cafeteria	424
Inspectors, Testers, Sorters, Samplers, and Weighers	398
First-Line Supervisors of Production and Operating Workers	332
Mobile Heavy Equipment Mechanics, Except Engines	214
Helpers--Production Workers	210
Industrial Truck and Tractor Operators	146
Packers and Packagers, Hand	132
Meat, Poultry, and Fish Cutters and Trimmers	125
Driver/Sales Workers	64
Butchers and Meat Cutters	56
Industrial Production Managers	56
Food Service Managers	42
Packaging and Filling Machine Operators and Tenders	33

Source: EMSI, Garner Economics



**Table 2.3**  
***Degree Completions in Region\* in Majors Related to Food Manufacturing & Related Services, 2014–15 Academic Year***

Major	Certificate	Associate	Bachelor	Post-Grad
Business, Accounting & Finance	208	47	218	70
Culinary Services	0	26	50	0
Precision Production	412	0	0	0
Transportation & Materials Moving	4,069	0	0	0
<b>Total</b>	<b>4,689</b>	<b>73</b>	<b>268</b>	<b>70</b>

*\*Includes Fletcher Technical Community College in Terrebonne Parish, as well as Nicholls State University and South Central Louisiana Community College, which are located in Lafourche Parish.*

*Source: National Center for Education Statistics, Garner Economics*

## TARGET 2: ENERGY & MARINE PRODUCTION & SUPPORT SERVICES



Terrebonne Parish is one of the leading areas for oil and gas production in the United States. In addition to having a significant base of employment in the energy sector, the *Oil and Gas* industry also sustains a major marine and port economy. At present, though, the *Marine*

industry in the Parish is primarily geared to the local energy and aquaculture sectors, as existing port facilities do not support major cargo operations.

Global demand for shipping is on the rise due to increased trade activity. While this will help increase activity at all ports, the Port of Terrebonne cannot accommodate major oceangoing vessels, and thus cannot compete with larger Gulf ports. Efforts for the marine portion of this target should therefore focus more on smaller operations and inland transportation along major rivers.

There are many opportunities to leverage the region’s existing assets in

this target group to support growth in new industries. For example, the region already has more than 1,500 jobs in the ship- and boat-building industry, but most of this is geared to the oil and gas sector. This existing base could be expanded to companies that build or repair commercial vessels, operate machine shops, or repair heavy equipment. Also, the region has about 600 jobs that provide support to the water transportation industry—again, much of this is related to oil and gas. These cargo handling, navigation, freight arrangement, and packing operators can adapt their capabilities to serve other industries.

The energy sector itself remains a major component of Terrebonne’s economy and offers continued growth opportunity. Although the *Oil and Gas* industry is highly volatile and subject to global economic and political forces, it is projected to show growth and stability in the near term. The energy sector in Terrebonne Parish is therefore likely to grow over the next few years.

### Rationales

- Well positioned to serve regional and national markets (P)
- Access to four-lane highways, rail service, port facilities (P)
- General aviation airports capable of handling corporate aircraft (P)
- Availability of skilled industrial workers (P)
- Reasonable availability of managerial personnel (P)
- Quality of labor-management relations (P)
- Availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Availability of manufacturing processes (P)
- Within ½ hour of major university/college (P)
- Availability of engineering programs at local institutions (P)
- Low rate of unionization in local labor force (P)
- Opportunity to retain resident workers within the region (C)
- Ability to protect and leverage historic oil, gas, and marine industries (C)
- Strong growth in regional *Manufacturing* sector (C)
- Expected growth in global *Oil & Gas* industry (P)
- Average target subsector national earnings of \$79,954 (C)
- Average target subsector 10-year past employment growth rate: 10.8%
- Average target subsector 10-year forecast employment growth rate: 13.5%
- An existing local pool of high-demand occupations (Table 2.5) (P)
- Quality of place assets: availability of all types of housing, low cost of living, cultural activity, recreational opportunities, medical facilities (P)

**Table 2.4**  
**Energy & Marine Production & Support Services Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
211111	Crude Petroleum and Natural Gas Extraction	\$195,863	30.5%	22.8%	0.175
213111	Drilling Oil and Gas Wells	\$111,868	-25.0%	-0.9%	0.061
213112	Support Activities for Oil and Gas Operations	\$93,347	36.7%	32.2%	0.245
237120	Oil and Gas Pipeline and Related Structures Construction	\$91,647	52.6%	29.5%	0.134
336611	Ship Building and Repairing	\$84,393	11.0%	11.7%	0.105
336612	Boat Building	\$54,923	-41.4%	-19.2%	0.037
483113	Coastal and Great Lakes Freight Transportation	\$121,933	19.9%	29.3%	0.011
483211	Inland Water Freight Transportation	\$102,292	7.4%	22.2%	0.021
48412	General Freight Trucking, Long-Distance	\$58,097	-2.7%	7.2%	0.885
484230	Specialized Freight Trucking, Long-Distance	\$66,845	14.3%	15.9%	0.140
488310	Port and Harbor Operations	\$117,696	-12.8%	12.6%	0.020
488320	Marine Cargo Handling	\$73,286	14.8%	16.7%	0.053
488330	Navigational Services to Shipping	\$97,475	-17.6%	1.0%	0.018
488390	Other Support Activities for Water Transportation	\$71,941	-20.0%	-8.6%	0.008
488510	Freight Transportation Arrangement	\$70,588	15.5%	11.8%	0.228
811310	Commercial and Industrial Machinery and Equipment Repair and Maintenance.	\$60,484	10.9%	11.3%	0.250
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$79,954</b>	<b>10.8%</b>	<b>13.5%</b>	<b>2.392</b>

Source: EMSI, Garner Economics



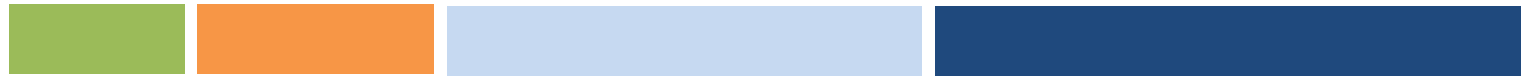
**Table 2.5**  
**Energy & Marine Production & Support Services: Terrebonne Parish Existing Labor Pool of High-Demand Occupations–2015**

Occupation	Employed in Terrebonne
Welders, Cutters, Solderers, and Brazers	1,157
Heavy and Tractor-Trailer Truck Drivers	1,101
General and Operations Managers	941
Laborers and Freight, Stock, and Material Movers, Hand	937
Maintenance and Repair Workers, General	824
Operating Engineers and Other Construction Equipment Operators	795
Riggers	666
Captains, Mates, and Pilots of Water Vessels	629
First-Line Supervisors of Office and Administrative Support Workers	622
Construction Laborers	587
Service Unit Operators, Oil, Gas, and Mining	536
Machinists	481
Electricians	440
First-Line Supervisors of Construction Trades and Extraction Workers	430
Industrial Machinery Mechanics	430
Carpenters	417
First-Line Supervisors of Mechanics, Installers, and Repairers	362
First-Line Supervisors of Production and Operating Workers	332
Sailors and Marine Oilers	321
Roustabouts, Oil and Gas	320
Shipping, Receiving, and Traffic Clerks	302
Petroleum Pump System Operators, Refinery Operators, and Gaugers	277
Plumbers, Pipefitters, and Steamfitters	249
First-Line Supervisors of Transp. and Material-Moving Machine & Vehicle Operators	245
Team Assemblers	243
Mobile Heavy Equipment Mechanics, Except Engines	214
Helpers--Production Workers	210
Structural Metal Fabricators and Fitters	191

**Table 2.5** (continued)

Occupation	Employed in Terrebonne
Dispatchers, Except Police, Fire, and Ambulance	188
Crane and Tower Operators	157
Rotary Drill Operators, Oil and Gas	156
Industrial Truck and Tractor Operators	146
Production, Planning, and Expediting Clerks	137
Ship Engineers	136
Installation, Maintenance, and Repair Workers, All Other	132
Derrick Operators, Oil and Gas	132
Mechanical Engineers	125
Painters, Transportation Equipment	122
Helpers--Extraction Workers	107
First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand	93
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	77
Industrial Engineers	76
Wellhead Pumpers	48
Layout Workers, Metal and Plastic	48
Mechanical Drafters	48
Sheet Metal Workers	46
Architectural and Engineering Managers	46
Fiberglass Laminators and Fabricators	43
Geological and Petroleum Technicians	40
Tank Car, Truck, and Ship Loaders	40
Petroleum Engineers	35
Geoscientists, Except Hydrologists and Geographers	31
Material Moving Workers, All Other	25
Motorboat Operators	20
Marine Engineers and Naval Architects	19

Source: EMSI, Garner Economics



**Table 2.6**  
***Degree Completions in Region\* in Majors Related to Energy & Marine Production & Support Services 2014–15 Academic Year***

Major	Certificate	Associate	Bachelor	Post-Grad
Business, Accounting & Finance	208	47	218	70
Construction Trades	45	0	0	0
Engineering Technologies	291	283	46	0
Mathematics and Statistics	0	0	7	6
Mechanic & Repair Technologies/Technicians	297	13	0	0
Physical Sciences	0	0	5	0
Precision Production	412	0	0	0
Transportation & Materials Moving	4,069	0	0	0
<b>Total</b>	<b>5,322</b>	<b>343</b>	<b>276</b>	<b>76</b>

*\*Includes Fletcher Technical Community College in Terrebonne Parish, as well as Nicholls State University and South Central Louisiana Community College, which are located in Lafourche Parish.*

*Source: National Center for Education Statistics, Garner Economics*

### TARGET 3: COASTAL RESTORATION



Terrebonne Parish, like much of the Gulf Coast, has been subjected to natural and man-made disasters throughout its history, epitomized by Hurricanes Katrina and Rita and the Deepwater Horizon oil spill. These events had catastrophic short-term effects on the Parish’s residents,

environment, and economy. However, there has been a long-term benefit: The recovery and cleanup operations left behind a base of experience and knowledge regarding coastal restoration.

Building this industry target group will require a diverse workforce of engineers, technicians, scientists, and heavy construction workers. Terrebonne Parish already has a strong base of labor in these areas, due to both the *Oil & Gas* industry and to the presence of technical training programs at Nicholls State University, Fletcher Technical Community College, and South Central Louisiana Community College.

The development of this industry target is supported by several federal,

state, and local initiatives that fund the development and implementation of coastal restoration projects. At the federal level, the Coastal Wetlands Planning, Protection, and Restoration Act (CWPPRA) has funded hundreds of millions of dollars in restoration efforts in the Parish; this is expected to continue. Another federal program is the Coastal Impact Assistance Program, which funds programs to mitigate the environmental impacts of the *Oil & Gas* industry. At the state level, the Louisiana Coastal Area (LCA) Study has funded several major initiatives as well.

The Parish itself has a Department of Coastal Restoration and Preservation. This office coordinated the development of a Comprehensive Coastal Restoration Plan for the Parish in 2009. This plan puts forth an “offensive strategy,” centered on the large-scale restoration of barrier islands, estuaries, and habitats. This ambitious plan was designed to be implemented over a 100-year period—as such, there will be many opportunities for projects for technical and heavy construction contractors for decades to come.

#### Rationales

- Loss of more than 300 square miles of coastal land over the past 60 years and continued threat to coastal areas (C)
- Federal, state, and local commitment to coastal restoration investments and projects (P)
- Availability of engineers, technicians, and scientists (P)
- Availability of heavy construction personnel (P)
- Quality of labor-management relations (P)
- Availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Availability of post-secondary training programs at Nicholls State, Fletcher Tech, and South Central Louisiana CC (P)
- Opportunity to create high-wage jobs in the region (C)
- Growth in the *Professional, Scientific & Technical Services* sector (P)
- High concentration in the *Construction* sector (P)
- Opportunity to reduce reliance on expertise from outside the region (C)
- Average target subsector national earnings of \$94,662 (C)
- Average target subsector 10-year past employment growth rate: 13.4%
- Average target subsector 10-year forecast employment growth rate: 19.1%
- An existing local pool of high-demand occupations (Table 2.8) (P)
- Quality of place assets: availability of all types of housing, low cost of living, cultural activity, recreational opportunities, medical facilities (P)





**Table 2.7**  
**Coastal Restoration Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
237990	Other Heavy and Civil Engineering Construction	\$77,866	-7.6%	17.5%	0.120
541330	Engineering Services	\$104,466	7.8%	15.8%	0.988
541360	Geophysical Surveying and Mapping Services	\$93,118	-1.1%	19.9%	0.019
541370	Surveying and Mapping (except Geophysical) Services	\$61,587	-33.2%	-8.7%	0.047
541620	Environmental Consulting Services	\$74,890	11.7%	19.2%	0.098
541690	Other Scientific and Technical Consulting Services	\$84,424	58.2%	41.3%	0.240
562910	Remediation Services	\$74,250	13.2%	13.1%	0.083
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$94,662</b>	<b>13.4%</b>	<b>19.1%</b>	<b>1.596</b>

Source: EMSI, Garner Economics



**Table 2.8**  
**Coastal Restoration: Terrebonne Parish Existing Labor Pool of High-Demand Occupations–2015**

Occupation	Employed in Terrebonne
Heavy and Tractor-Trailer Truck Drivers	1,101
Laborers and Freight, Stock, and Material Movers, Hand	937
Operating Engineers and Other Construction Equipment Operators	795
Construction Laborers	587
First-Line Supervisors of Construction Trades and Extraction Workers	430
Mobile Heavy Equipment Mechanics, Except Engines	214
Construction Managers	137
Mechanical Engineers	125
Environmental Scientists and Specialists, Including Health	110
Structural Iron and Steel Workers	96
Civil Engineers	76
Industrial Engineers	76
Cost Estimators	65
Surveying and Mapping Technicians	59
Electrical and Electronics Engineering Technicians	57
Surveyors	51
Mechanical Drafters	48
Architectural and Civil Drafters	46
Architectural and Engineering Managers	46
Civil Engineering Technicians	41
Refuse and Recyclable Material Collectors	36
Hazardous Materials Removal Workers	34
Excavating and Loading Machine and Dragline Operators	26
Commercial Divers	20

Source: EMSI, Garner Economics



**Table 2.9**  
**Degree Completions in Region\* in Majors Related to Coastal Restoration, 2014–15 Academic Year**

Major	Certificate	Associate	Bachelor	Post-Grad
Construction Trades	45	0	0	0
Engineering Technologies	291	283	46	0
Physical Sciences	0	0	5	0
Transportation & Materials Moving	4,069	0	0	0
<b>Total</b>	<b>4,405</b>	<b>283</b>	<b>51</b>	<b>0</b>

*\*Includes Fletcher Technical Community College in Terrebonne Parish, as well as Nicholls State University and South Central Louisiana Community College, which are located in Lafourche Parish.*

*Source: National Center for Education Statistics, Garner Economics*

## TARGET 4: AVIATION & AVIONICS



This target group represents a long-term target that aims to leverage Terrebonne Parish’s existing resources related to aviation. At present, this industry plays a supporting role in the regional economy, with about 300 *Aviation* sector jobs but no aircraft manufacturing or repair operations. However, with a coordinated vision and long-term commitment to this target group, there are many opportunities to build a robust aviation industry.

The rationale for this industry in the Parish centers on the Houma-Terrebonne Airport, a general aviation airport that boasts a 6,500-foot and a 5,000-foot runway, along with 1,000 acres of adjacent industrial land. While the airport does not have scheduled passenger service, it does have six fixed base operators (FBOs) and three helicopter operators, which mainly serve the *Oil & Gas* industry.

The Parish is well positioned to capture rising demand in the U.S. aircraft,

engine, and parts manufacturing industry. This sector is expected to grow rapidly, as air travel demand increases and airlines modernize fleets to remain competitive. Also, the domestic charter flight industry is expected to grow due to a confluence of increasing disposable income, rising corporate profits, and low fuel prices.

Within the region, the *Oil* industry remains a key part of the *Aviation* sector, as helicopter pilots and mechanics are needed to service offshore drilling facilities. A growing *Aviation* industry will be well positioned to take advantage of the expertise already in the local workforce. Other opportunities within this target group include maintenance, repair, and overhaul (MRO) operations; drone manufacturing; and navigation and avionics systems manufacturing. A necessary component of this target will be the establishment of an Airframe and Power Plant (A&P) certificate program at Fletcher Technical Community College. Such a program would train FAA-certified workers for the *Aviation* industry, including mechanics, assemblers, and avionics technicians.

### Rationales

- Centrally located for regional and national markets (P)
- Presence of FBOs and helicopter operations (P)
- Long runways and ample capacity at Houma-Terrebonne Airport (P)
- Availability of skilled industrial workers (P)
- Availability of engineers, technicians, and scientists (P)
- Availability of post-secondary vocational training (P)
- Availability of on-the-job training assistance (P)
- Within ½ hour of major university/college (P)
- Opportunity to create A&P program at Fletcher Tech (C)
- Growing local demand for rotor-based aircraft operations (P)
- Availability of manufacturing processes (P)
- Availability of tax credits, incentives, and low-interest loans (P)
- Availability of labor training incentives (P)
- Low rate of unionization in local labor force (P)
- Opportunity to retain resident workers within the region (C)
- Strong growth in regional *Manufacturing* sector (C)
- Average target subsector national earnings of \$109,171 (C)
- Average target subsector 10-year past employment growth rate: 2.0%
- Average target subsector 10-year forecast employment growth rate: 2.3%
- An existing local pool of high-demand occupations (Table 2.11) (P)
- Quality of place assets: availability of all types of housing, low cost of living, cultural activity, recreational opportunities, medical facilities (P)



**Table 2.10**  
**Aviation & Avionics Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System Mfg.	\$129,667	-20.7%	-12.0%	0.125
336411	Aircraft Manufacturing	\$130,266	3.3%	1.6%	0.229
336412	Aircraft Engine and Engine Parts Manufacturing	\$110,318	-3.9%	-3.7%	0.081
336413	Other Aircraft Parts and Auxiliary Equipment Manufacturing	\$88,272	16.1%	11.8%	0.107
423860	Transportation Equipment and Supplies Merchant Wholesalers	\$85,892	-5.6%	0.8%	0.032
481211	Nonscheduled Chartered Passenger Air Transportation	\$106,017	-16.2%	8.2%	0.030
481212	Nonscheduled Chartered Freight Air Transportation	\$105,328	6.9%	28.7%	0.008
488190	Other Support Activities for Air Transportation	\$69,970	22.0%	11.8%	0.112
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$109,171</b>	<b>2.0%</b>	<b>2.3%</b>	<b>0.723</b>

Source: EMSI, Garner Economics



**Table 2.11**  
**Aviation & Avionics: Terrebonne Parish Existing Labor Pool of High-Demand Occupations–2015**

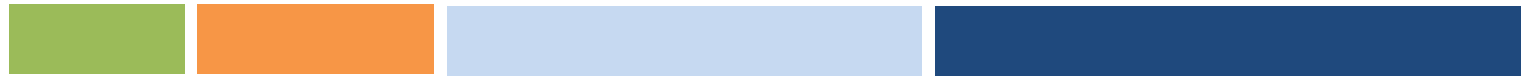
Occupation	Employed in Terrebonne
Office Clerks, General	1,114
Heavy and Tractor-Trailer Truck Drivers	1,101
General and Operations Managers	941
Laborers and Freight, Stock, and Material Movers, Hand	937
Maintenance and Repair Workers, General	824
Bookkeeping, Accounting, and Auditing Clerks	631
Stock Clerks and Order Fillers	625
First-Line Supervisors of Office and Administrative Support Workers	622
Sales Representatives, Wholesale and Manufacturing, Except Tech./Sci. Products	597
Light Truck or Delivery Services Drivers	485
Machinists	481
Industrial Machinery Mechanics	430
Customer Service Representatives	411
Accountants and Auditors	406
Inspectors, Testers, Sorters, Samplers, and Weighers	398
First-Line Supervisors of Mechanics, Installers, and Repairers	362
First-Line Supervisors of Production and Operating Workers	332
Shipping, Receiving, and Traffic Clerks	302
Team Assemblers	243
Business Operations Specialists, All Other	234
Mobile Heavy Equipment Mechanics, Except Engines	214
Sales Representatives, Services, All Other	206
Dispatchers, Except Police, Fire, and Ambulance	188
Parts Salespersons	183
Purchasing Agents, Except Wholesale, Retail, and Farm Products	158
Commercial Pilots	148



**Table 2.11 (continued)**

Occupation	Employed in Terrebonne
Sales Representatives, Wholesale and Manufacturing, Tech./Sci. Products	138
Production, Planning, and Expediting Clerks	137
Mechanical Engineers	125
Management Analysts	115
Bus and Truck Mechanics and Diesel Engine Specialists	111
Aircraft Mechanics and Service Technicians	99
First-Line Supervisors of Non-Retail Sales Workers	89
Industrial Engineers	76
Computer-Controlled Machine Tool Operators, Metal and Plastic	75
Electrical and Electronics Engineering Technicians	57
Industrial Production Managers	56
Market Research Analysts and Marketing Specialists	54
Order Clerks	51
Architectural and Engineering Managers	46
Industrial Engineering Technicians	38
Computer Systems Analysts	33
Computer and Information Systems Managers	30
Software Developers, Applications	28
Flight Attendants	21
Electrical Engineers	19
Logisticians	19
Tool and Die Makers	17
Software Developers, Systems Software	15
Electronics Engineers, Except Computer	15
Electrical and Electronic Equipment Assemblers	14

Source: EMSI, Garner Economics



**Table 2.12**  
**Degree Completions in Region\* in Majors Related to Aviation & Avionics, 2014–15 Academic Year**

Major	Certificate	Associate	Bachelor	Post-Grad
Business, Accounting & Finance	208	47	218	70
Computer & Information Sciences	22	0	0	0
Construction Trades	45	0	0	0
Engineering Technologies	291	283	46	0
Mathematics & Statistics	0	0	7	6
Mechanic & Repair Technologies/Technicians	297	13	0	0
Precision Production	412	0	0	0
Transportation & Materials Moving	4,069	0	0	0
<b>Total</b>	<b>5,344</b>	<b>343</b>	<b>271</b>	<b>76</b>

*\*Includes Fletcher Technical Community College in Terrebonne Parish, as well as Nicholls State University and South Central Louisiana Community College, which are located in Lafourche Parish.*

*Source: National Center for Education Statistics, Garner Economics*





## TARGET 5: HEALTH SERVICES



The health services target group already forms one of the pillars of Terrebonne Parish’s economy. As of 2016, the *Health Care & Social Assistance* sector employs 6,800 people in Terrebonne, trailing only *Manufacturing* as the largest sector in the Parish. *Health Care* is also

one of the Parish’s fastest growing sectors, having added more than 1,100 jobs over the past five years.

About one-quarter of the Parish’s jobs in this sector are associated directly with Terrebonne General Medical Center (TGMC)—most jobs in this target are comprised by private practices and service providers for the elderly and those with special needs. TGMC serves the 114,000 residents of Terrebonne Parish, as well as those visiting or working in the area. The hospital has expanded to meet the needs of the Parish’s growing and aging population.

In spite of the major presence and growth prospects of this cluster, the local *Health Care* industry is mainly limited by its orientation to providing retail health care services to the local resident market, as opposed to regional destination services. An exception to this is TGMC’s Diabetes Management Center and cardiovascular care resources, which have emerged as a leading destination for the prevention and treatment of diabetes and obesity. These resources provide further growth opportunities for the health services target.

Another component of this target is specific to the region’s aging population: the care and housing of the elderly. This target includes nursing care facilities, continuing care retirement communities, and assisted living facilities. This is becoming a critical issue in Terrebonne Parish, as its age 65+ population increased by more than 15 percent between 2005 and 2014, and is set to expand further in the coming years as Baby Boomers continue to age.

### Rationales

- Presence of Terrebonne General Medical Center as a community hospital (P) (C)
- Diabetes Management Center and cardiovascular treatment programs at TGMC (P) (C)
- Availability of skilled medical workers (P)
- Availability of post-secondary training programs at multiple levels for health care professionals (P)
- Proximity to medical schools at Tulane and LSU (P)
- Availability of on-the-job training assistance (P)
- Recent and expected population growth (P)
- Strong growth in age 65+ population (P)
- Opportunity to retain resident workers within the region (C)
- Strong growth in regional *Health Care* sector (C)
- Strong growth in regional *Healthcare Practitioners & Technical* occupational group (P)
- Average target subsector national earnings of \$61,794 (C)
- Average target subsector 10-year past employment growth rate: 28.8%
- Average target subsector 10-year forecast employment growth rate: 24.3%
- An existing local pool of high-demand occupations (Table 2.14) (P)
- Quality of place assets: availability of all types of housing, low cost of living, cultural activity, recreational opportunities (P)



**Table 2.13**  
**Health Services Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
611519	Other Technical and Trade Schools	\$52,110	3.6%	5.2%	0.065
621111	Offices of Physicians (Except Mental Health Specialists)	\$103,637	19.4%	17.5%	2.588
621112	Offices of Physicians, Mental Health Specialists	\$77,449	1.7%	9.4%	0.063
621210	Offices of Dentists	\$61,856	15.3%	14.2%	0.973
6213	Offices of Other Health Practitioners	\$48,691	38.8%	31.4%	0.965
6214	Outpatient Care Centers	\$69,547	55.9%	35.2%	0.805
621511	Medical Laboratories	\$70,916	35.9%	27.6%	0.202
621512	Diagnostic Imaging Centers	\$74,584	10.2%	14.1%	0.077
621610	Home Health Care Services	\$34,101	55.0%	42.6%	1.447
623110	Nursing Care Facilities (Skilled Nursing Facilities)	\$38,832	5.1%	9.6%	1.663
623311	Continuing Care Retirement Communities	\$34,044	47.8%	40.8%	0.475
623312	Assisted Living Facilities for the Elderly	\$29,168	32.7%	33.7%	0.420
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$61,794</b>	<b>28.8%</b>	<b>24.3%</b>	<b>9.742</b>

Source: EMSI, Garner Economics



**Table 2.14**  
**Health Services: Terrebonne Parish Existing Labor Pool of High-Demand Occupations–2015**

Occupation	Employed in 1A Region
Registered Nurses	972
Bookkeeping, Accounting, and Auditing Clerks	631
Personal Care Aides	611
Licensed Practical and Licensed Vocational Nurses	414
Customer Service Representatives	411
Executive Secretaries and Executive Administrative Assistants	408
Nursing Assistants	386
Home Health Aides	376
Medical Assistants	180
Billing and Posting Clerks	168
Pharmacy Technicians	141
Medical Secretaries	128
Radiologic Technologists	108
Pharmacists	106
Dental Assistants	81
Dental Hygienists	75
Medical Records and Health Information Technicians	74
Emergency Medical Technicians and Paramedics	73
Physicians and Surgeons, All Other	71
Bill and Account Collectors	70
Medical and Health Services Managers	66
Medical and Clinical Laboratory Technologists	66
Respiratory Therapists	62
Physical Therapists	60
File Clerks	54
Nurse Practitioners	53
Health Technologists and Technicians, All Other	52



**Table 2.14** (continued)

Occupation	Employed in 1A Region
Nurse Anesthetists	50
Teachers and Instructors, All Other	50
Speech-Language Pathologists	49
Family and General Practitioners	47
Phlebotomists	45
Training and Development Specialists	43
Occupational Therapists	43
Physician Assistants	43
Pharmacy Aides	42
Instructional Coordinators	40
Opticians, Dispensing	39
Dentists, General	36
Physical Therapist Aides	34
Medical and Clinical Laboratory Technicians	31
Surgical Technologists	31
Diagnostic Medical Sonographers	30
Medical Transcriptionists	29
Occupational Health and Safety Specialists	28
Optometrists	27
Massage Therapists	27
Surgeons	27
Magnetic Resonance Imaging Technologists	26
Ophthalmic Medical Technicians	24
Anesthesiologists	22
Dietitians and Nutritionists	22
Psychiatric Technicians	21
Cardiovascular Technologists and Technicians	18
Physical Therapist Assistants	17

Source: EMSI, Garner Economics



**Table 2.15**  
***Degree Completions in Region\* in Majors Related to Health Services, 2014–15 Academic Year***

Major	Certificate	Associate	Bachelor	Post-Grad
Biological & Biomedical Sciences	0	0	40	7
Health Professions	180	55	169	9
Physical Sciences	0	0	5	0
<b>Total</b>	<b>180</b>	<b>55</b>	<b>214</b>	<b>16</b>

*\*Includes Fletcher Technical Community College in Terrebonne Parish, as well as Nicholls State University and South Central Louisiana Community College, which are located in Lafourche Parish.*

*Source: National Center for Education Statistics, Garner Economics*

## TARGET 6: PROFESSIONAL SERVICES



Although Terrebonne Parish has an established base of employers in the professional, business, and financial services, this industry group lags well behind other major sectors in the area. As with other targets, much of the region's current professional workforce serves the *Oil & Gas* sector.

Terrebonne Parish has an opportunity to build upon its pool of managerial, professional, and clerical workers to grow its services economy. This includes companies that provide accounting, payroll, human resources, management, business support, and other related services to businesses located both inside and outside the region.

The Parish is an attractive location for these types of business-to-business services for several reasons, including proximity to New Orleans, a skilled

workforce, quality of place resources, low property taxes, availability of training for all levels of professional workers, and an excellent general aviation airport. These advantages make the region attractive to businesses that offer services that can be provided remotely to a variety of customers around the country and the world. Demand for such operations is growing due to a continued movement towards outsourcing and rising corporate profits.

Terrebonne is also an appealing alternative location to Houston or New Orleans for regional offices for larger financial and professional services firms. Part of the Parish's appeal is its accessibility to air travel—in addition to corporate and charter air service from Houma-Terrebonne Airport, Houma is approximately an hour's drive from Louis Armstrong New Orleans International Airport.

### Rationales

- Centrally located for regional and national markets (P)
- Access to major highways (P)
- Availability of general aviation service locally and commercial air passenger service at MSY Airport (P)
- Good broadband availability and speed (P)
- Reasonable availability of managerial personnel (P)
- Reasonable availability of skilled clerical workers (P)
- Availability of post-secondary vocational training (P)
- Within ½ hour of major university/college (P)
- Availability of M.B.A. program at Nicholls State (P)
- Reasonable availability of business and professional services (P)
- Availability of low-interest loans for small business (P)
- Low local property taxes (P)
- Growing population of residents in 25–34 age group (P)
- Opportunity to retain resident workers within the region (C)
- Emerging *Professional, Scientific & Technical Services* sector (C)
- Employment growth in *Business & Financial Operations* occupations (P)
- Local wages in related sectors about 20 percent below national average (P)
- Average target subsector national earnings of \$103,786 (C)
- Average target subsector 10-year past employment growth rate: 26.2%
- Average target subsector 10-year forecast employment growth rate: 14.9%
- An existing local pool of high-demand occupations (Table 2.17) (P)
- Quality of place assets: availability of all types of housing, low cost of living, cultural activity, recreational opportunities (P)



**Table 2.16**  
**Professional Services Target Subsectors**

NAICS	Description	National Earnings, 2016	2006–2016 National Job Growth	2016–2026 National Job Growth Forecast	National Job Count, 2016 (Millions)
541211	Offices of Certified Public Accountants	\$96,379	15.4%	10.3%	0.487
541214	Payroll Services	\$83,251	22.4%	15.5%	0.187
541611	Administrative Management & General Management Consulting Services	\$104,918	45.0%	30.6%	0.643
551114	Corporate, Subsidiary, and Regional Management Offices	\$135,757	27.6%	9.4%	2.156
561110	Office Administrative Services	\$95,570	33.7%	19.9%	0.507
5614	Business Support Services	\$44,406	13.2%	16.4%	0.978
<b>WEIGHTED AVERAGES/TOTALS</b>		<b>\$103,786</b>	<b>26.2%</b>	<b>14.9%</b>	<b>4.959</b>

Source: EMSI, Garner Economics



**Table 2.17**  
**Professional Services: Terrebonne Parish Existing Labor Pool of High-Demand Occupations–2015**

Occupation	Employed in 1A Region
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	1,138
Office Clerks, General	1,114
General and Operations Managers	941
Bookkeeping, Accounting, and Auditing Clerks	631
First-Line Supervisors of Office and Administrative Support Workers	622
Receptionists and Information Clerks	506
Customer Service Representatives	411
Executive Secretaries and Executive Administrative Assistants	408
Accountants and Auditors	406
Business Operations Specialists, All Other	234
Sales Representatives, Services, All Other	206
Billing and Posting Clerks	168
Financial Managers	126
Management Analysts	115
Human Resources Specialists	88
Payroll and Timekeeping Clerks	74
Bill and Account Collectors	70
Administrative Services Managers	64
Computer User Support Specialists	54
Market Research Analysts and Marketing Specialists	54
Data Entry Keyers	53
Computer Systems Analysts	33
Computer and Information Systems Managers	30
Software Developers, Applications	28
Financial Analysts	24
Marketing Managers	21

Source: EMSI, Garner Economics





**Table 2.18**  
**Degree Completions in Region\* in Majors Related to Professional Services, 2014–15 Academic Year**

Major	Certificate	Associate	Bachelor	Post-Grad
Business, Accounting & Finance	208	47	218	70
Communications & Journalism	0	0	26	0
Engineering Technologies	291	283	46	0
Liberal Arts, Humanities & Social Sciences	142	122	239	0
Mathematics & Statistics	0	0	7	6
Psychology	0	0	49	33
<b>Total</b>	<b>641</b>	<b>452</b>	<b>585</b>	<b>109</b>

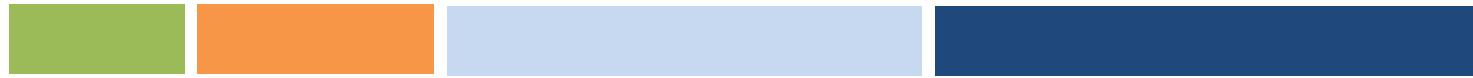
*\*Includes Fletcher Technical Community College in Terrebonne Parish, as well as Nicholls State University and South Central Louisiana Community College, which are located in Lafourche Parish.*

*Source: National Center for Education Statistics, Garner Economics*



**Table 2.19**  
**Target Subsector Descriptions**

<b>Target 1: Food Manufacturing &amp; Related Services</b>	
<b>NAICS 311212</b>	<b>Rice Milling</b>
This U.S. industry comprises establishments primarily engaged in one of the following: (1) milling rice; (2) cleaning and polishing rice; or (3) milling, cleaning, and polishing rice. The establishments in this industry may package the rice they mill with other ingredients.	
<b>NAICS 311314</b>	<b>Soybean and Other Oilseed Processing</b>
This industry comprises establishments primarily engaged in (1) processing sugarcane and/or (2) refining cane sugar from raw cane sugar.	
<b>NAICS 311314</b>	<b>Cane Sugar Manufacturing</b>
This U.S. industry comprises establishments primarily engaged in (1) processing sugarcane and/or (2) refining cane sugar from raw cane sugar.	
<b>NAICS 311710</b>	<b>Seafood Product Preparation and Packaging</b>
This industry comprises establishments primarily engaged in one or more of the following: (1) canning seafood (including soup); (2) smoking, salting, and drying seafood; (3) eviscerating fresh fish by removing heads, fins, scales, bones, and entrails; (4) shucking and packing fresh shellfish; (5) processing marine fats and oils; and (6) freezing seafood.	
<b>NAICS 32531</b>	<b>Fertilizer Manufacturing</b>
This U.S. industry comprises establishments primarily engaged in one or more of the following: (1) nitrogenous fertilizer manufacturing; (2) phosphatic fertilizer manufacturing; and (3) mixing ingredients made elsewhere into fertilizer.	
<b>NAICS 325320</b>	<b>Pesticide and Other Agricultural Chemical Manufacturing</b>
This industry comprises establishments primarily engaged in the formulation and preparation of agricultural and household pest control chemicals (except fertilizers).	
<b>NAICS 333241</b>	<b>Food Product Machinery Manufacturing</b>
This U.S. industry comprises establishments primarily engaged in manufacturing food and beverage manufacturing-type machinery and equipment, such as dairy product plant machinery and equipment (e.g., homogenizers, pasteurizers, ice cream freezers), bakery machinery and equipment (e.g., dough mixers, bake ovens, pastry rolling machines), meat and poultry processing and preparation machinery, and other commercial food products machinery (e.g., slicers, choppers, and mixers).	
<b>NAICS 423830</b>	<b>Industrial Machinery Merchant Wholesalers</b>
This industry comprises establishments primarily engaged in the merchant wholesale distribution of specialized machinery, equipment, and related parts generally used in manufacturing, oil well, and warehousing activities.	



**Table 2.19** (continued)

<b>Target 1: Food Manufacturing &amp; Related Services</b> (continued)	
<b>NAICS 424460</b>	<b>Fish and Seafood Merchant Wholesalers</b>
This industry comprises establishments primarily engaged in the merchant wholesale distribution of fish and seafood (except canned or packaged frozen).	
<b>NAICS 424510</b>	<b>Grain and Field Bean Merchant Wholesalers</b>
This industry comprises establishments primarily engaged in the merchant wholesale distribution of grains, such as corn, wheat, oats, barley, and unpolished rice; dry beans; and soybeans and other inedible beans.	
<b>NAICS 445220</b>	<b>Fish and Seafood Markets</b>
This industry comprises establishments primarily engaged in retailing fresh, frozen, or cured fish and seafood products.	
<b>NAICS 493120</b>	<b>Refrigerated Warehousing and Storage</b>
This industry comprises establishments primarily engaged in operating refrigerated warehousing and storage facilities. The services provided by these establishments include blast freezing, tempering, and modified atmosphere storage services.	



**Table 2.19 (continued)**

<b>Target 2: Energy and Marine Production &amp; Support Services</b>	
<b>NAICS 211111</b>	<b>Crude Petroleum and Natural Gas Extraction</b>
This industry comprises establishments primarily engaged in (1) the exploration, development and/or the production of petroleum or natural gas from wells in which the hydrocarbons will initially flow or can be produced using normal pumping techniques or (2) the production of crude petroleum from surface shales or tar sands or from reservoirs in which the hydrocarbons are semisolids.	
<b>NAICS 213111</b>	<b>Drilling Oil and Gas Wells</b>
This U.S. industry comprises establishments primarily engaged in drilling oil and gas wells for others on a contract or fee basis. This industry includes contractors that specialize in spudding in, drilling in, re-drilling, and directional drilling.	
<b>NAICS 213112</b>	<b>Support Activities for Oil and Gas Operations</b>
This U.S. industry comprises establishments primarily engaged in performing support activities on a contract or fee basis for oil and gas operations (except site preparation and related construction activities). Services included are exploration (except geophysical surveying and mapping); excavating slush pits and cellars, well surveying; running, cutting, and pulling casings, tubes, and rods; cementing wells, shooting wells; perforating well casings; acidizing and chemically treating wells; and cleaning out, bailing, and swabbing wells.	
<b>NAICS 237120</b>	<b>Oil and Gas Pipeline and Related Structures Construction</b>
This industry comprises establishments primarily engaged in the construction of oil and gas lines, mains, refineries, and storage tanks. The work performed may include new work, reconstruction, rehabilitation, and repairs.	
<b>NAICS 336611</b>	<b>Ship Building and Repairing</b>
This U.S. industry comprises establishments primarily engaged in operating a shipyard. Shipyards are fixed facilities with drydocks and fabrication equipment capable of building a ship, defined as watercraft typically suitable or intended for other than personal or recreational use.	
<b>NAICS 336612</b>	<b>Boat Building</b>
This U.S. industry comprises establishments primarily engaged in building boats. Boats are defined as watercraft not built in shipyards and typically of the type suitable or intended for personal use.	



**Table 2.19** (continued)

<b>Target 2: Energy and Marine Production &amp; Support Services</b> (continued)	
<b>NAICS 483113</b>	<b>Coastal and Great Lakes Freight Transportation</b>
This U.S. industry comprises establishments primarily engaged in providing water transportation of cargo in coastal waters, on the Great Lakes System, or deep seas between ports of the United States, Puerto Rico, and United States island possessions or protectorates.	
<b>NAICS 483211</b>	<b>Inland Water Freight Transportation</b>
This U.S. industry comprises establishments primarily engaged in providing inland water transportation of cargo on lakes, rivers, or intracoastal waterways (except on the Great Lakes System).	
<b>NAICS 48412</b>	<b>General Freight Trucking, Long-Distance</b>
This industry comprises establishments primarily engaged in providing long-distance general freight trucking. General freight establishments handle a wide variety of commodities, generally palletized and transported in a container or van trailer.	
<b>NAICS 484230</b>	<b>Specialized Freight Trucking, Long-Distance</b>
This industry comprises establishments primarily engaged in providing long-distance specialized trucking. These establishments provide trucking between metropolitan areas that may cross North American country borders.	
<b>NAICS 488310</b>	<b>Port and Harbor Operations</b>
This industry comprises establishments primarily engaged in operating ports, harbors (including docking and pier facilities), or canals.	
<b>NAICS 488320</b>	<b>Marine Cargo Handling</b>
This industry comprises establishments primarily engaged in providing stevedoring and other marine cargo handling services (except warehousing).	
<b>NAICS 488330</b>	<b>Navigational Services to Shipping</b>
This industry comprises establishments primarily engaged in providing navigational services to shipping. Marine salvage establishments are included in this industry.	
<b>NAICS 488390</b>	<b>Other Support Activities for Water Transportation</b>
This industry comprises establishments primarily engaged in providing services to water transportation (except port and harbor operations; marine cargo handling services; and navigational services to shipping).	
<b>NAICS 488510</b>	<b>Freight Transportation Arrangement</b>
This industry comprises establishments primarily engaged in arranging transportation of freight between shippers and carriers. These establishments are usually known as freight forwarders, marine shipping agents, or customs brokers and offer a combination of services spanning transportation modes.	
<b>NAICS 811310</b>	<b>Commercial and Industrial Machinery and Equipment Repair and Maintenance</b>
This industry comprises establishments primarily engaged in the repair and maintenance of commercial and industrial machinery and equipment.	



**Table 2.19** (continued)

Target 3: Coastal Restoration	
<b>NAICS 237990</b>	<b>Other Heavy and Civil Engineering Construction</b>
This industry comprises establishments primarily engaged in heavy and engineering construction projects (excluding highway, street, bridge, and distribution line construction). The work performed may include new work, reconstruction, rehabilitation, and repairs. Specialty trade contractors are included in this group if they are engaged in activities primarily related to engineering construction projects (excluding highway, street, bridge, distribution line, oil and gas structure, and utilities building and structure construction). Construction projects involving water resources (e.g., dredging and land drainage), development of marine facilities, and projects involving open space improvement (e.g., parks and trails) are included in this industry.	
<b>NAICS 541330</b>	<b>Engineering Services</b>
This industry comprises establishments primarily engaged in applying physical laws and principles of engineering in the design, development, and utilization of machines, materials, instruments, structures, processes, and systems.	
<b>NAICS 541360</b>	<b>Geophysical Surveying and Mapping Services</b>
This industry comprises establishments primarily engaged in gathering, interpreting, and mapping geophysical data. Establishments in this industry often specialize in locating and measuring the extent of subsurface resources, such as oil, gas, and minerals; they may also conduct surveys for engineering purposes.	
<b>NAICS 541370</b>	<b>Surveying and Mapping (except Geophysical) Services</b>
This industry comprises establishments primarily engaged in performing surveying and mapping services of the surface of the earth, including the sea floor. These services may include surveying and mapping of areas above or below the surface of the earth, such as the creation of view easements or segregating rights in parcels of land by creating underground utility easements.	
<b>NAICS 541620</b>	<b>Environmental Consulting Services</b>
This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on environmental issues, such as the control of environmental contamination from pollutants, toxic substances, and hazardous materials. These establishments identify problems (e.g., inspect buildings for hazardous materials), measure and evaluate risks, and recommend solutions. They employ a multidisciplinary staff of scientists, engineers, and other technicians with expertise in areas, such as air and water quality, asbestos contamination, remediation, and environmental law. Establishments providing sanitation or site remediation consulting services are included in this industry.	
<b>NAICS 541690</b>	<b>Other Scientific and Technical Consulting Services</b>
This industry comprises establishments primarily engaged in providing advice and assistance to businesses and other organizations on scientific and technical issues (except environmental).	
<b>NAICS 562910</b>	<b>Remediation Services</b>
This industry comprises establishments primarily engaged in one or more of the following: (1) remediation and cleanup of contaminated buildings, mine sites, soil, or ground water; (2) integrated mine reclamation activities, including demolition, soil remediation, waste water treatment, hazardous material removal, contouring land, and revegetation; and (3) asbestos, lead paint, and other toxic material abatement.	



**Table 2.19 (continued)**

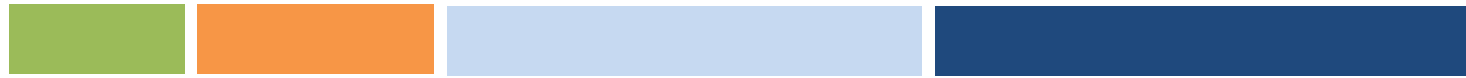
<b>Target 4: Aviation &amp; Avionics</b>	
<b>NAICS 334511</b>	<b>Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System Manufacturing</b>
This industry comprises establishments primarily engaged in manufacturing search, detection, navigation, guidance, aeronautical, and nautical systems and instruments. Examples of products made by these establishments are aircraft instruments (except engine), flight recorders, navigational instruments and systems, radar systems and equipment, and sonar systems and equipment.	
<b>NAICS 336411</b>	<b>Aircraft Manufacturing</b>
This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing or assembling complete aircraft; (2) developing and making aircraft prototypes; (3) aircraft conversion (i.e., major modifications to systems); and (4) complete aircraft overhaul and rebuilding (i.e., periodic restoration of aircraft to original design specifications).	
<b>NAICS 336412</b>	<b>Aircraft Engine and Engine Parts Manufacturing</b>
This industry comprises establishments primarily engaged in one or more of the following: (1) manufacturing aircraft engines and engine parts; (2) developing and making prototypes of aircraft engines and engine parts; (3) aircraft propulsion system conversion (i.e., major modifications to systems); and (4) aircraft propulsion systems overhaul and rebuilding (i.e., periodic restoration of aircraft propulsion system to original design specifications).	
<b>NAICS 336413</b>	<b>Other Aircraft Parts and Auxiliary Equipment Manufacturing</b>
This industry comprises establishment primarily engaged in (1) manufacturing aircraft parts or auxiliary equipment (except engines and aircraft fluid power subassemblies) and/or (2) developing and making prototypes of aircraft parts and auxiliary equipment. Auxiliary equipment includes such items as crop dusting apparatus, armament racks, inflight refueling equipment, and external fuel tanks.	
<b>NAICS 423860</b>	<b>Transportation Equipment and Supplies Merchant Wholesalers</b>
This industry comprises establishments primarily engaged in the merchant wholesale distribution of transportation equipment and supplies (except marine pleasure craft and motor vehicles).	
<b>NAICS 481211</b>	<b>Nonscheduled Chartered Passenger Air Transportation</b>
This industry comprises establishments primarily engaged in providing air transportation of passengers or passengers and cargo with no regular routes and regular schedules.	
<b>NAICS 481212</b>	<b>Nonscheduled Chartered Freight Air Transportation</b>
This industry comprises establishments primarily engaged in providing air transportation of cargo without transporting passengers with no regular routes and regular schedules.	
<b>NAICS 488190</b>	<b>Other Support Activities for Air Transportation</b>
This industry comprises establishments primarily engaged in providing specialized services for air transportation (except air traffic control and other airport operations).	



**Table 2.19** (continued)

<b>Target 5: Health Services</b>	
<b>NAICS 611519</b>	<b>Other Technical and Trade Schools</b>
This industry comprises establishments primarily engaged in offering job or career vocational or technical courses (except cosmetology and barber training, aviation and flight training, and apprenticeship training). The curriculums offered by these schools are highly structured and specialized and lead to job-specific certification.	
<b>NAICS 621111</b>	<b>Offices of Physicians (Except Mental Health Specialists)</b>
This industry comprises establishments of health practitioners having the degree of M.D. (Doctor of Medicine) or D.O. (Doctor of Osteopathy) primarily engaged in the independent practice of general or specialized medicine (except psychiatry or psychoanalysis) or surgery. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.	
<b>NAICS 621112</b>	<b>Offices of Physicians, Mental Health Specialists</b>
This industry comprises establishments of health practitioners having the degree of M.D. (Doctor of Medicine) or D.O. (Doctor of Osteopathy) primarily engaged in the independent practice of psychiatry or psychoanalysis. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers.	
<b>NAICS 621210</b>	<b>Offices of Dentists</b>
This industry comprises establishments of health practitioners having the degree of D.M.D. (Doctor of Dental Medicine), D.D.S. (Doctor of Dental Surgery), or D.D.Sc. (Doctor of Dental Science) primarily engaged in the independent practice of general or specialized dentistry or dental surgery. These practitioners operate private or group practices in their own offices (e.g., centers, clinics) or in the facilities of others, such as hospitals or HMO medical centers. They can provide either comprehensive preventive, cosmetic, or emergency care, or specialize in a single field of dentistry.	
<b>NAICS 6213</b>	<b>Offices of Other Health Practitioners</b>
This industry comprises a range of health care professionals, including chiropractors, optometrists, mental health practitioners, physical, occupational and speech therapists, audiologists, podiatrists, and other areas of expertise.	
<b>NAICS 6214</b>	<b>Outpatient Care Centers</b>
This industry includes establishments that provide specialized outpatient treatment such as family planning, mental health, substance abuse treatment, kidney dialysis, ambulatory surgery, and emergency care.	
<b>NAICS 621511</b>	<b>Medical Laboratories</b>
This industry comprises establishments known as medical laboratories primarily engaged in providing analytic or diagnostic services, including body fluid analysis, generally to the medical profession or to the patient on referral from a health practitioner.	
<b>NAICS 621512</b>	<b>Diagnostic Imaging Centers</b>
This industry comprises establishments known as diagnostic imaging centers primarily engaged in producing images of the patient generally on referral from a health practitioner.	





**Table 2.19 (continued)**

<b>Target 5: Health Services (continued)</b>	
<b>NAICS 621610</b>	<b>Home Health Care Services</b>
This industry comprises establishments primarily engaged in providing skilled nursing services in the home, along with a range of the following: personal care services; homemaker and companion services; physical therapy; medical social services; medications; medical equipment and supplies; counseling; 24-hour home care; occupation and vocational therapy; dietary and nutritional services; speech therapy; audiology; and high-tech care, such as intravenous therapy.	
<b>NAICS 623110</b>	<b>Nursing Care Facilities (Skilled Nursing Facilities)</b>
This industry comprises establishments primarily engaged in providing inpatient nursing and rehabilitative services. The care is generally provided for an extended period of time to individuals requiring nursing care. These establishments have a permanent core staff of registered or licensed practical nurses who, along with other staff, provide nursing and continuous personal care services.	
<b>NAICS 623311</b>	<b>Continuing Care Retirement Communities</b>
This industry comprises establishments primarily engaged in providing a range of residential and personal care services with on-site nursing care facilities for (1) the elderly and other persons who are unable to fully care for themselves and/or (2) the elderly and other persons who do not desire to live independently. Individuals live in a variety of residential settings with meals, housekeeping, social, leisure, and other services available to assist residents in daily living. Assisted living facilities with on-site nursing care facilities are included in this industry.	
<b>NAICS 623312</b>	<b>Assisted Living Facilities for the Elderly</b>
This industry comprises establishments primarily engaged in providing residential and personal care services (i.e., without on-site nursing care facilities) for (1) the elderly or other persons who are unable to fully care for themselves and/or (2) the elderly or other persons who do not desire to live independently. The care typically includes room, board, supervision, and assistance in daily living, such as housekeeping services.	



**Table 2.19 (continued)**

Target 6: Professional Services	
<b>NAICS 541211</b>	<b>Offices of Certified Public Accountants</b>
This U.S. industry comprises establishments of accountants that are certified to audit the accounting records of public and private organizations and to attest to compliance with generally accepted accounting practices.	
<b>NAICS 541214</b>	<b>Payroll Services</b>
This U.S. industry comprises establishments (except offices of CPAs) engaged in the following without also providing accounting, bookkeeping, or billing services: (1) collecting information on hours worked, pay rates, deductions, and other payroll-related data from their clients; and (2) using that information to generate paychecks, payroll reports, and tax filings.	
<b>NAICS 541611</b>	<b>Administrative Management &amp; General Management Consulting Services</b>
This U.S. industry comprises establishments primarily engaged in providing operating advice and assistance to businesses and other organizations on administrative management issues, such as financial planning and budgeting, equity and asset management, records management, office planning, strategic and organizational planning, site selection, new business startup, and business process improvement.	
<b>NAICS 551114</b>	<b>Corporate, Subsidiary, and Regional Management Offices</b>
This U.S. industry comprises establishments (except government establishments) primarily engaged in administering, overseeing, and managing other establishments of the company or enterprise. These establishments normally undertake the strategic or organizational planning and decision making role of the company or enterprise.	
<b>NAICS 561110</b>	<b>Office Administrative Services</b>
This industry comprises establishments primarily engaged in providing a range of day-to-day office administrative services such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics for others on a contract or fee basis. These establishments do not provide operating staff to carry out the complete operations of a business.	
<b>NAICS 5614</b>	<b>Business Support Services</b>
This industry includes a range of sectors that provide services to other business types, including document preparation, telephone call centers, business service centers, collection agencies, credit bureaus, repossession, court reporting, and other related services.	



## TRANSFERABILITY OF SKILLS FROM THE OIL & GAS INDUSTRY

A central focus of this plan is to help Terrebonne Parish build a diverse economy that can better withstand the volatility of the *Oil & Gas* industry. As discussed under several of the targets, an important component of this strategy is to adapt the existing base of skills in that industry’s workforce to the needs of the region’s growing industry sectors. The U.S. Department of Labor’s O\*NET program contains a wealth of information regarding the particular skills and training required for all major occupational types. One of these pieces of information is skills transferability from one occupation to another. This dataset links each occupation with other occupations that require similar skills.

This section of the report presents O\*NET skills transferability data for the top occupations employed in the Parish’s *Oil & Gas* industry. This information will help the community’s economic development leaders identify workers for many of the target industry subsectors. Occupations listed in Table 2.20 as “compatible occupations” are those with a compatibility index of greater than 90 and similar median wage levels, according to EMSI. These occupations require similar skills and training as the region’s *Oil & Gas* industry occupations.

**Table 2.20**  
**Selected Compatible Occupations for Oil & Gas Industry Occupations**

Oil & Gas Industry Occupations	Jobs in Terrebonne	Median Hourly Earnings	Compatible Occupations (Compatibility Index >90)
Welders, Cutters, Solderers, and Brazers	1,157	\$20.90	Engine and Other Machine Assemblers; Sheet Metal Workers; Paving, Surfacing, and Tamping Equipment Operators; Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic; Machinists; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Insulation Workers, Mechanical; Painters, Transportation Equipment; Tank Car, Truck, and Ship Loaders
Heavy and Tractor-Trailer Truck Drivers	1,101	\$18.27	Rail Yard Engineers; Locomotive Firers; Railroad Brake, Signal, and Switch Operators; Crane and Tower Operators; Light Truck or Delivery Services Drivers; Locomotive Engineers; Excavating and Loading Machine and Dragline Operators
Operating Engineers and Other Construction Equipment Operators	795	\$19.96	Paving, Surfacing, and Tamping Equipment Operators; Crane and Tower Operators; Earth Drillers, Except Oil and Gas; Pile-Driver Operators; Dredge Operators; Hoist and Winch Operators; Industrial Truck and Tractor Operators
Riggers	666	\$15.73	Pile-Driver Operators; Structural Metal Fabricators and Fitters; Engine and Other Machine Assemblers; Motorboat Mechanics and Service Technicians; Painters, Construction and Maintenance; Maintenance Workers, Machinery; Industrial Truck and Tractor Operators
Service Unit Operators, Oil, Gas, and Mining	536	\$29.17	Septic Tank Servicers and Sewer Pipe Cleaners; Biomass Plant Technicians; Water and Wastewater Treatment Plant and System Operators; Electrical Power-Line Installers and Repairers; Motorboat Mechanics and Service Technicians; Transportation Vehicle, Equipment and Systems Inspectors, Except Aviation; Ship Engineers; Industrial Machinery Mechanics; Tank Car, Truck, and Ship Loaders



**Table 2.20 (continued)**

Oil & Gas Industry Occupations	Jobs in Terrebonne	Median Hourly Earnings	Compatible Occupations (Compatibility Index >90)
Machinists	481	\$20.86	Machine Tool Setters, Operators, and Tenders; Model Makers, Metal and Plastic; Biomass Plant Technicians; Maintenance Workers, Machinery; Automotive Body and Related Repairers; Sheet Metal Workers; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Tool and Die Makers; Cabinetmakers and Bench Carpenters
First-Line Supervisors of Construction Trades and Extraction Workers	430	\$27.30	First-Line Supervisors of Production and Operating Workers; Solar Energy Installation Managers; Mechanical Engineering Technicians; First-Line Supervisors of Transportation and Material-Moving Machine and Vehicle Operators; Freight and Cargo Inspectors; Aviation Inspectors; Energy Auditors; Construction and Building Inspectors; Airfield Operations Specialists; Aircraft Cargo Handling Supervisors
First-Line Supervisors of Production and Operating Workers	332	\$27.34	First-Line Supervisors of Construction Trades and Extraction Workers; Storage and Distribution Managers; Power Distributors and Dispatchers; Mechanical Engineering Technicians; Manufacturing Production Technicians; Biomass Plant Technicians; Career/Technical Education Teachers; Industrial Engineers; Quality Control Analysts
Sailors and Marine Oilers	321	\$21.58	Crane and Tower Operators; Rail Yard Engineers; Highway Maintenance Workers; Septic Tank Servicers and Sewer Pipe Cleaners; Biomass Plant Technicians; Mates- Ship, Boat, and Barge; Bus and Truck Mechanics and Diesel Engine Specialists; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Gas Plant Operators; Fiberglass Laminators and Fabricators
Roustabouts, Oil and Gas	320	\$15.17	Reinforcing Iron and Rebar Workers; Paving, Surfacing, and Tamping Equipment Operators; Industrial Truck and Tractor Operators; Laborers and Freight, Stock, and Material Movers, Hand; Painters, Transportation Equipment; Sheet Metal Workers; Helpers—Electricians; Engine and Other Machine Assemblers; Structural Metal Fabricators and Fitters; Painters, Construction and Maintenance
Petroleum Pump System Operators, Refinery Operators and Gaugers	277	\$25.02	Chemical Equipment Operators and Tenders; Biomass Plant Technicians; Computer-Controlled Machine Tool Operators, Metal and Plastic; Hazardous Materials Removal Workers; Aircraft Structure, Surfaces, Rigging, and Systems Assemblers; Machinists; Geothermal Technicians; Coating, Painting, and Spraying Machine Setters, Operators, and Tenders
Rotary Drill Operators, Oil and Gas	156	\$23.43	Hazardous Materials Removal Workers; Biomass Plant Technicians; Septic Tank Servicers and Sewer Pipe Cleaners; Cooling and Freezing Equipment Operators and Tenders; Mates- Ship, Boat, and Barge; Motorboat Mechanics and Service Technicians; Farmworkers, Farm, Ranch, and Aquacultural Animals; Telecommunications Line Installers and Repairers
Derrick Operators, Oil and Gas	132	\$20.83	Highway Maintenance Workers; Crane and Tower Operators; Hazardous Materials Removal Workers; Tank Car, Truck, and Ship Loaders; Septic Tank Servicers and Sewer Pipe Cleaners; Biomass Plant Technicians; Reinforcing Iron and Rebar Workers; Structural Iron and Steel Workers; Electrical Power-Line Installers and Repairers; Mates- Ship, Boat, and Barge



**Table 2.20 (continued)**

Oil & Gas Industry Occupations	Jobs in Terrebonne	Median Hourly Earnings	Compatible Occupations (Compatibility Index >90)
Helpers-Extraction Workers	107	\$16.26	Septic Tank Servicers and Sewer Pipe Cleaners; Reinforcing Iron and Rebar Workers; Paving, Surfacing, and Tamping Equipment Operators; Automotive Body and Related Repairers; Engine and Other Machine Assemblers; Farmworkers, Farm, Ranch, and Aquacultural Animals; Packaging and Filling Machine Operators and Tenders; Cooling and Freezing Equipment Operators and Tenders; Heavy and Tractor-Trailer Truck Drivers
Wellhead Pumpers	48	\$32.76	Gas Compressor and Gas Pumping Station Operators; Maintenance Workers, Machinery; Control and Valve Installers & Repairers; Cutting, Punching, and Press Machine Setters, Operators, and Tenders, Metal and Plastic; Engine and Other Machine Assemblers; Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic; Landscaping and Groundskeeping Workers; Helpers—Electricians; Motorboat Mechanics and Service Technicians; Electrical and Electronics Installers and Repairers, Transportation Equipment
Petroleum Engineers	35	\$45.05	Brownfield Redevelopment Specialists and Site Managers; Wind Energy Engineers; Water Resource Specialists; Industrial Engineers; Materials Scientists; Biofuels/Biodiesel Technology and Product Development Managers; Environmental Engineers; Climate Change Analysts

*Source: EMSI, Garner Economics*

### CHAPTER 3: OBSERVATIONS—WHERE DO WE GO FROM HERE? A SITE SELECTOR'S PERSPECTIVE



To ensure that Terrebonne Parish can leverage its many assets and strengthen its business climate to retain the companies it has, as well as attract its targets and others, the Parish must be proactive in shaping Terrebonne's economic future and setting it apart from other peer jurisdictions.

The following observations, conclusions, and recommendations are based on data and feedback collected during Phase I and noted in the previously cited **COMPETITIVE REALITIES REPORT**. They also build upon the assessments made to prioritize the business targets identified in Chapter 2.

As noted in the introductory chapters, this assessment—and the observations therein—were developed from a site selector's perspective. The recommendations are built with an eye toward those areas that will differentiate Terrebonne. The first goal of this strategy is to provide a framework for the Parish to consider its economic development service delivery and activities to support and augment the work of TEDA and other Parish departments and organizations involved in economic development. Therefore, these recommendations are designed to go beyond traditional recruitment, expansion, and retention activities. The recommendations look at Terrebonne and its economic future holistically and explore ways to better connect and leverage the Parish's talent and workforce, entrepreneurship, infrastructure, and business climate.

As with any strategy, there will be some elements that the Parish—and TEDA in particular—can take on independently. There will be other initiatives that will need to be taken in collaboration with others or in support of others. TEDA will be a champion for the initiatives as a means to improving the Parish's competitiveness as a place to do business and one that can attract the types of talent that will drive the economy for years to come. The recommendations were written so as to calibrate the Parish's actions to its specific role.

Garner Economics developed the conclusions and recommendations with the following principles for the Parish in mind:

- **Undertake economic development activities in the context of work being done to strengthen not only the Parish, but also the entire region.** As noted frequently in the **COMPETITIVE REALITIES REPORT**, Terrebonne is part of a dynamic and changing region. It has the opportunity to better collaborate with and leverage the strengths of its neighbors. One goal of the strategy is to identify those areas where Terrebonne can both attract and retain jobs and also support efforts within the broader region to build a stronger community and to be the chosen home for those jobs. Hence, the recommendations were created in a rounded manner. They provide a framework to capitalize on the Parish's unique assets while also strengthening the Parish's current "market" conditions.

- Be a leader.** The success of the economic development strategy will depend not only on the changes TEDA makes regarding how it does business and services its clients, but also on its ability to be a leader within the Parish for making the case for such collaboration and change. Where there continues to be disagreement as to the future trajectory of Terrebonne’s growth, TEDA should work to build consensus around paths that are realistic given the Parish’s assets and potential, as well as around those that provide a strong enough value proposition to differentiate Terrebonne from its competitors and peers. Going forward, the economic development leaders in the Parish should make the case for how these new initiatives or the changes in policies will improve the Parish’s business climate and, in turn, its ability to provide world-class economic development service delivery and opportunities for those it serves.

Recommendations for action are categorized under three areas of opportunity: Enhance the Product (Product Improvement), Tell the Story (Marketing), and Execute Effectively (Organizational). In some instances, and where relevant and possible, a cost estimate to implement the noted recommendation has been offered.

FIGURE 3.1: AN ECONOMIC ENHANCEMENT STRATEGY FOR TERREBONNE PARISH



## ENHANCE THE PRODUCT (PRODUCT IMPROVEMENT)

The Parish “product” is defined as the infrastructure—including a favorable business climate—needed to attract investment in the Parish. Local marketing efforts are only successful if the Parish has a community “product” to sell, including sites and buildings, transportation infrastructure, utility infrastructure, workforce development, entrepreneurship, and incentives.

### 1. Create a culture, programs, and support infrastructure for entrepreneurship in Terrebonne Parish

**Observation:** The Kauffman Foundation suggests that, nationally, new firms and young businesses disproportionately contribute to net job creation throughout the economy and account for more than two-thirds of gross job creation. Data from the **COMPETITIVE REALITIES REPORT** suggest that such activity is weak in Terrebonne. Measuring the relative proportion of persons who are *Self-Employed* is a rough means to gauge entrepreneurial activity, which, in turn, can provide a view of local risk-taking and economic dynamism.

FIGURE 3.2: SELF-EMPLOYED WORKERS

	Self-Employed— Incorporated	Self-Employed— Not Incorporated & Unpaid Family Workers	Self-Employed Total
Terrebonne Parish			
2005–2009	4.1%	6.2%	10.3%
2010–2014	3.3%	5.1%	8.4%
Louisiana			
2005–2009	3.6%	6.5%	10.1%
2010–2014	3.5%	5.6%	9.1%
United States			
2005–2009	3.6%	6.8%	10.4%
2010–2014	3.5%	6.3%	9.8%

Source: US Census Bureau ACS 5-Year Estimates, Garner Economics

For all civilian workers aged 16 and over, a total of 8.4 percent of workers in Terrebonne Parish were classified as *Self-Employed*. Of this rate, 3.3 percent were *Incorporated* and 5.1 percent were *Not Incorporated* or an *Unpaid Family Worker*.

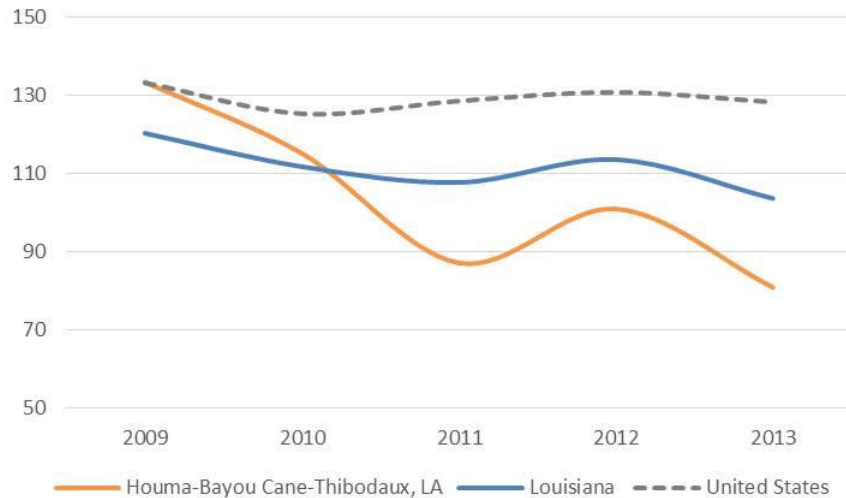
The current self-employment rate for Terrebonne Parish is under the self-employment rate in Louisiana and the nation. Comparing self-employment over time, all geographies in this study experienced a decrease in the total number of *Self-Employed*; however, Terrebonne Parish had a sharper decline than the benchmarks.

Tracking the rate of startup firms is another good measure of the entrepreneurial ecosystem of an area. The ability to create a new company, which establishes new jobs, bolsters the local economy.

The Houma-Thibodaux MSA has experienced a steady drop in the number of startup firms overall, with 170 new firms created in 2013, the latest year available. The measure is for all types of firms and is at the lowest number since 2007.



FIGURE 3.3: STARTUP FIRMS



Source: US Census Bureau, Business Dynamics Statistics, Garner Economics

For an alternate view of startup activity, the number of new firms per 100,000 residents—or startup density—helps to evaluate trends compared to the state and nation. In viewing the number of startup firms relative to population, the Houma-Thibodaux MSA was above the state and equal to the nation in 2009, but it has experienced a sharper decline in recent years.

**Recommendation:** TEDA and the Parish government should partner with Fletcher Technical Community College to create a small business incubator and related programs to grow entrepreneurship in the area and to help entrepreneurs beat the odds of startup failure. The International Business Innovation Association defines business incubators as “facilities and programs that nurture the development of entrepreneurial companies, helping them survive and grow during the start-up period, when they are most vulnerable. These programs provide their client companies with business support services and resources tailored to young firms. The most common goals of incubation programs are creating jobs in a community, enhancing a community’s entrepreneurial climate, retaining businesses in a community, building or accelerating growth in a local industry, and diversifying local economies.”

According to the *State of the Business Incubation Industry*, as of 2012, there are about 1,200 incubators in the United States, up from 12 in 1980.

- About 32 percent of North American business incubators are sponsored by academic institutions.
- 25 percent are sponsored by economic development organizations.
- 16 percent are sponsored by government entities.
- 4 percent are sponsored by other types of organizations.
- 4 percent of business incubators are “hybrids” with more than one sponsor.
- 4 percent are sponsored by for-profit entities.
- 15 percent of incubators have no sponsor or host organization.

Based on our own observations of successful incubation programs and facilities, and validated by the statistics noted above, we believe that the best chance for success is a joint collaboration between Fletcher Technical Community College and TEDA. Ideally, the incubator is managed by an academic institution, and academia serves as a resource to the entrepreneurs that are housed at the facility.

Typically, incubators will offer the following business consulting to help entrepreneurs and small business second stage companies:

- Accounting
- Finances
- Human resources
- Web design
- Life strategy coaching
- Federal acquisition
- Patents
- Business management
- Marketing and branding
- Process improvement
- Infrastructure development

**Best practice example:** AB Tech Community College (Asheville, North Carolina)

<https://www.abtech.edu/content/business-incubation-program/program-information>

## 2. Establish an Airframe and Power Plant (A&P) certificate program at Fletcher Tech

**Observation:** The Aircraft Assembly, Modification & Maintenance subsector target noted in Chapter 2 should be considered an aspirational target, in that, while many of the necessary requirements currently exist in the Parish, there would still need to be the establishment of an Airframe and Power Plant (A&P) certificate program to produce a truly competitive target.

This target represents a relatively narrow set of industries under the *Aviation & Avionics* heading, which all share specialty-trained workers as their most significant optimal site factor. Changes and expected growth in the *Aviation* industry are opening new opportunities. Significant factors include: 1) airlines continuing to reduce costs and outsource maintenance facilities to cut costs, 2) U.S.-based domestic and international airlines are projected to purchase more aircraft and parts, 3) expansion of the global fleet of commercial aircraft is expected to reach nearly 30,000 units by 2021, thus increasing the global demand for commercial aircraft services, and 4) many foreign companies' inability to keep up with demand is creating opportunities for American firms.

**Recommendation:** Fletcher Technical Community College should investigate the possibility of establishing an A&P certificate program located at the Houma-Terrebonne Airport/Industrial Park (HUM) and in partnership with the Airport Commission. This certificated program will allow the Parish to compete globally in the attraction of maintenance, repair, and aircraft assembly operations.

**Lead organizations:** Houma-Terrebonne Airport; Fletcher Technical Community College; TEDA

### Best practice examples:

- **Guilford Technical Community College**  
<http://www.gtcc.edu/programs-of-study/aviation-systems-technology/airframe-and-powerplant-certificate.aspx>;
- **Liberty University**  
<http://www.liberty.edu/index.cfm?PID=17773>;
- **South Louisiana Community College**  
<http://solacc.edu/sites/default/files/academic/Aviation%20Maintenance%20Technology%20-%20TD%202016-17.pdf>

### 3. Develop hangar facilities to attract MROs and aircraft assembly operations



**Observation:** In conjunction with recommendation #2 above, and with the assumption that Fletcher Tech would begin an A&P certificate program, it would be incumbent upon the Airport Commission, and part of their long-term strategy, to develop hangar space at HUM so as to attract airline maintenance and repair operations and aircraft assembly facilities to HUM.

**Recommendation:** HUM should develop hangar space large enough to attract an MRO or assembly operation based on the type of aircraft that may have the most opportunity for work in HUM. Based on the size of the runway (6,500 feet), smaller, corporate aircraft, or rotor (helicopters) would be an ideal size of the type of aircraft facilities to attract.

**Best practice examples:** Brookley Field—Mobile, Alabama; Cecil Field—Jacksonville, Florida; Liberty University—Lynchburg, Virginia

### 4. Create a plan to improve gateways into the Parish

**Observation:** As noted by focus group participants, survey respondents, and the consultants' own observations, the gateways into Terrebonne Parish are either nondescript or are in disrepair.

**Recommendations:** As a way to welcome both visitors and potential businesses, the Parish should work to improve major gateways by enhancing landscaping that enhances the esthetics of the Parish. Work should also be done to encourage redevelopment or refurbishing of structures near the gateways to complement the facelift. By improving the overall appearance and building on the Parish's unified brand, the Parish can make it more distinct and build a sense of community pride. The *Keep Terrebonne Beautiful* campaign, founded in 2000, is a great start to this. But more effort needs to be done to enhance other facets that aren't litter-related, such as signage, junk cars, dilapidated housing, and other considerations that could detract investment. The charm factor is an important component to business attraction and investment. We offered this recommendation to TEDA in 2007/2008 and see little improvement in the gateways since then. State and local highways including 24, 182, and 311 are the key arteries noted for improvement.

#### Best practice examples:

- **Augusta, Georgia:** The City of Augusta, Georgia, created a public/private partnership between the Georgia Department of Transportation, the Augusta Convention and Visitors Bureau, local businesses, and concerned citizens to work on several projects beautifying the city's major corridors. For each of these projects, the group has commissioned plans, conducted bids, managed construction, and continues to oversee ongoing weekly landscape maintenance.



<http://www.augustaga.gov/1721/Gateway-and-Corridor-Beautification>

- **Jersey City, New Jersey:** The *Gateway Beautification* program in Jersey City, New Jersey, sought to enhance the appearance of the Gateway areas and to make them safer by upgrading planting; maintaining trees, shrubs, evergreens, and flowering plants; and installing paved walkways and crosswalks, decorative steel fencing, flag and banner poles, and lighting. The program is run by the Jersey City Division of Economic Development.

#### 5. **Funding: Create sales tax allocation districts or utilize tax increment financing more effectively**

**Observation:** Focus group participants and survey respondents widely commented that the region has a dire need for significant infrastructure improvements, including roads and bridges, bike trails, green space, and water and sewer infrastructure to allow for quality economic growth and to strengthen the Parish's quality of place. However, these needs take resources or money, which the Parish must provide. These require large investments or recurring funding, but are necessary for Terrebonne to compete regionally, nationally, and globally. A sustainable funding source for the Parish would serve as a catalyst for those local economic development initiatives that would otherwise be problematic to implement but would significantly improve the area's business climate, such as our recommendation related to hangar facilities, a small business incubator, beautification initiatives, and more.

Some parishes like Lafayette, Iberia, and St. Martin have implemented a sustainable funding stream using tools, such as tax increment financing and sales tax districts, that have had a profound impact on infrastructure and product development for these respective parishes. (For illustrative purposes, the St. Martin Sales Tax District No. 2 collections for 2014 totaled \$1.738 million.)

Terrebonne has the Occupational License Fee, which generated \$1.4 million in FY 2016. The tax allocation was modified in 2008 so that one-half was set aside for economic development. Currently, that allocation is at zero, and TEDA operates with a \$475,000 budget from reserves. But

using financing methods specific for infrastructure improvements related to economic development is a best practice example of effective economic development financing.

**Recommendation:** The Terrebonne Parish Council should utilize either the reallocation of tax increment financing tools so that funding using a TIF is set aside for the specific infrastructure improvements related to projects within the geography defined, or to levy an additional one cent sales tax from a designated Louisiana Sales Tax District, which will create new revenue related to the geography in question (Louisiana HB 668 adopted in 2008). The latter approach could be a transformational tool to build and fund related economic development infrastructure, as other parishes have done.

**Best practice example:** St. Martin Parish, Iberia Parish

## TELL THE STORY (MARKETING)

In being more proactive, Terrebonne Parish and TEDA have the opportunity to tell the Parish's story more effectively and to be a better spokesperson for the economic dynamism of the community. Site-location advisors, entrepreneurs, and companies within the targeted business sectors are the primary audience for such efforts.

### 1. Enhance the TEDA website to address the needs of location consultants and potential investors

**Observation:** Though the TEDA website contains information that is of value to potential investors in many facets, it is difficult to find existing data on the current website or the data may be irrelevant. The site also has a dated feel compared to other best practice websites noted below. An economic development organization's (EDO) website is its most important marketing tool to attract investment into the region. As such, the TEDA website needs to be designed to offer the resources that meet its primary and specific audiences' needs.

**Recommendation:** As TEDA strengthens its business development and marketing efforts for the Parish, its website should be adjusted to serve both the information needs and the interests of location advisory audiences and companies doing site searches on their own. The site's navigation functionality, graphic appeal, and available data should be built and directed to these external audiences.

From the perspective of a location advisory firm, Garner Economics suggests the following recommendations to enhance the TEDA website:

- Navigation should be restructured to better serve each target sector, especially for recruitment. Successful websites have oriented navigation by audience type, such as the four industry targets noted in Chapter 2.
- While advisors will begin their expansion or location search via the internet, eventually real-time contact with considered locations is made. Contact information (especially phone) should be clearly visible on each page (e.g., in the header of the site) and on all material for printing or downloading.
- Data most commonly considered in the location process by site selectors and corporate end-users should be available and easily accessible. The data compiled for Terrebonne from the **COMPETITIVE REALITIES REPORT** should be used.
- A PDF creator should be employed, so visitors can customize documents for printing or downloading.
- Branded, thematic maps should be created to orient and inform website visitors.

- Social media tools should be integrated into the website’s strategy given the local audience and investors that use such tools. Site-location consultants and many companies that are engaged in the site-location search will not use social media as frequently; however, potential work talent and employees do, and they may influence their company’s location decision.
- Content providing a Parish and regional overview and statistical data should be created and translated into the languages of potential international clients [e.g., Japanese, Chinese, Korean, German, Spanish, Portuguese, and Hebrew (there is great growth opportunity from Israeli companies)]. TEDA should also consider other languages from countries that have an influx or interest in Terrebonne (e.g., French).

**Best practice examples:**

- EDC of Southwest Indiana (<http://www.southwestindiana.org>)
- Charlotte Regional Partnership (<http://charlotteusa.com>)
- Boone County, Indiana (<http://boonecdc.org/>)
- Chambers County, Alabama (<http://www.chambersida.com/>)

**Cost:** \$20,000

**2. Modify the Parish “Bayou Country” brand specifically for TEDA and its external outreach**

**Observation:** Terrebonne Parish and its affiliated marketing partners created a unified brand several years ago called “Louisiana’s Bayou Country.” Depending on the organization’s usage, it can be modified for the respective organization.

**Recommendation:** Though we like the concept behind a unified brand, in this case, we think it has a negative connotation in the business attraction and investment side of the brand. As a site-location advisory firm, we immediately think of alligators and swamps and don’t see the applicability of the brand and mark (logo) to TEDA’s mission. In that regard, we suggest that TEDA have a twofold brand: internal and external. The internal brand in communicating to Terrebonne residents can include the “Bayou Country” tagline. Its external brand should have a more businesslike appeal that would resonate on a global basis. As such, it is recommended that TEDA incorporate a new brand identity for an external audience based on market research and the engagement of a branding/market research firm.

**Cost:** \$5,000–7,000





### 3. Enhance the Parish's marketing collateral, media, and public relations efforts

**Observation:** While TEDA has collateral (mostly electronically) to describe its programs, marketing materials need to be updated to embrace a revised TEDA brand and focused toward the primary audience of location advisors, entrepreneurs, and companies looking to locate their investments in the region. Such collateral should provide the types of data and information that are important to site-location advisors and be updated on a regular basis. The added functionality of the website noted above will support this task.



**Recommendation:** TEDA should develop targeted marketing materials for its business and talent recruitment efforts and better leverage software and online tools to facilitate contact and prospect management. TEDA should also consider establishing a contract with top public relations (PR) firm or individual to promote the region in local, state, and national press.

Collateral that should be created or updated include:

- Target audience datasheets that highlight the Parish's assets specifically to the targeted sectors;
- A branded slide library and PowerPoint template to create custom sales presentations; and
- A monthly e-newsletter (for external audiences) that communicates newsworthy items of interest for potential corporate investors, site-location consultants, entrepreneurs, and economic development allies.

**Cost:** No less than \$55,000 in year one of implementation. Most of the cost is related to contracting with the PR firm.

### 4. Actively solicit and provide information to site-location consultants

**Observation:** Because the business development efforts of TEDA have historically been reactive, little has been done to proactively provide information to location consultants. While most site-location advisors maintain their own databases based on published data and news reports, the firms also appreciate customized outreach from regions and communities to alert them to developments or improvements that may not be captured by the above sources. In addition to reminding the location consultants of the Parish's assets, such outreach also serves to help build an ongoing relationship with the given firm(s).

**Recommendation:** TEDA should call on site-location consultants that represent these targeted companies to explain the benefits of locating in the area. This can be done in partnership with LED and SLEC. Many of these consultants are based in Atlanta, Chicago, Dallas, and the New York/New Jersey metro area. TEDA should have a formalized visitation program to update firms in each of these cities once or twice a year.

**Cost:** \$10,000 annually for one staff member

### 5. Develop a Terrebonne community pride campaign

**Observation:** During our focus group sessions, we observed some of the community leadership conveying inaccurate or incorrect information about the community or the region, not maliciously, but because they weren't aware of the facts. This is primarily rooted in the issue of there not being one organization working to effectively present information of fact to the residents in an unbiased manner.

**Recommendation:** TEDA, the Chamber of Commerce, and the CVB should lead the development of a community pride campaign to tout the positive attributes of Terrebonne Parish and to help create a large pool of ambassadors of local citizens as advocates of the area.

**Cost:** \$5,000

### 6. Create a cadre of TEDA Ambassadors to extend the Parish's brand

**Observation:** Terrebonne is rich with business executives who travel the globe for their respective companies. TEDA can leverage those local connections and engage those executives to promote business investment in the area. Such third-party testimonials are an effective way to promote the area to their peers internationally.

**Recommendation:** TEDA should develop an ambassadors program to train willing business leaders to assist the organization in extending the brand of Terrebonne Parish as a place to do business. TEDA staff would provide the ambassadors with talking points and collateral to help them tout the Parish's business attributes.

**Best practice example:** The Greater Richmond Partnership  
<http://www.grpva.com/news-and-media/details/rva-agents-mission-possible>





## EXECUTE EFFECTIVELY (EFFECTIVE SERVICE DELIVERY)

If TEDA and Terrebonne Parish are to enhance their roles as leaders in economic development for the Parish, then Parish government and TEDA must align their mission and focus on those areas that will directly impact economic growth.

### 1. Create a one-stop permitting office to streamline the permitting process and create an internal culture of “yes”

**Observation:** Economic development wealth-building occurs when private investment causes a snowball effect of more private investment. The role of government in the economic development process is to nurture a strong business climate and implement a service delivery mechanism that serves as a catalyst and facilitator for investment to occur rather than as an inhibitor. In our focus group session with small businesses, we heard criticism of the Parish’s permitting, development appeals, and inspections process as it relates to inconsistencies in the local business permitting procedures (pages 7, 9, 11, and 14 in the **COMPETITIVE REALITIES REPORT**).

**Recommendation:** Terrebonne Parish should consider adding a one-stop permitting office, building on the organizational structure within the Planning and Zoning Department and create an ombudsman to break down barriers and manage the bureaucratic maze that exists within Parish departments (<http://www.tpcg.org/index.php?f=government>). A one-stop permitting office would be a positive influence in the business climate of the Parish. It not only provides efficiencies in the flow of approval and permitting on a local level, it adds to the Parish’s cachet of being innovative and creative in nurturing private investment for all of the Parish. Many times, municipal planners and inspections personnel are construed as regulators with a culture of “no.” Not to lessen the role that government needs to play to protect the character of a municipality or parish, it also needs to instill in its employees a culture of “yes” to spur private investment and to enhance the economic vitality of Terrebonne.

Typically, a one-stop review center to streamline the permit system provides citizens and businesses with a central reviewing agency located in one office. At a One-Stop Center, a single permit for construction can be issued for zoning approvals, site development, state highway, building, landscaping, environmental resources, drainage, public safety (fire), and driveways; business licenses; health inspection certificates; etc. (i.e., items required to open or operate a business in Terrebonne Parish).

Best practice examples:

- City of Redlands, California – <http://www.cityofredlands.org/permitcenter>
- City of Ocala, Florida – <http://www.ocalafl.org/GM/GM3.aspx?id=2427>

**Lead organization:** Parish Council and President

## 2. Develop a realistic and sustainable incentive policy for the Parish

**Observation:** As noted by those in both Parish government and the private sector representing development, local incentive offerings from Terrebonne Parish are unstructured and few. The result is that they are also unpredictable. Though being adaptive and flexible in incentive offerings has merit, most (not all) companies, consultants, and developers would prefer to see a uniform incentive structure based on the value of the capital investment, jobs created, and total economic impact on the community. In short, the investor would like to know the ground rules up front as it relates to incentives.

**Recommendation:** To properly and more accurately set expectations for companies considering investment in Terrebonne, the Parish should catalog all local incentives available to new and existing business and the eligibility criteria for each. Moreover, a uniform incentive policy that incorporates those policies and procedures should be developed with the level of incentives calibrated to projected economic impact of the project and the projected return on investment to the community. TEDA and the Parish government should post the information on an easily accessible page on their websites. A funding mechanism for economic development, suggested in the Product Improvement section as recommendation #5, would allow for the funding of incentives, where appropriate and within the guidelines developed by the Parish.

**Best practice example:** Wichita and Sedgwick Parish, Kansas – [http://www.sedgwickParish.org/finance/incentive\\_policy.asp](http://www.sedgwickParish.org/finance/incentive_policy.asp)

## 3. Create a Project Opportunity Fund (deal closing fund)

**Observation:** Having a local deal closing fund is a differentiator as it relates to attracting or retaining business investment. Most proactive municipalities in the United States have some form of a discretionary fund used to win an investment, based on a set of investment guidelines related to jobs, capital investment, targeted business sectors, and other criteria. Terrebonne is weak in that offering.

**Recommendation:** The Parish Council should set aside funds that can be carried forward to subsequent fiscal years if not used, as a deal closing fund. The Occupation License fee generates \$1.4 million a year and TEDA was funded from this tax (at one time). If 50 percent of the Occupation License Fee was allocated specifically for economic development, including TEDA operations, then the remaining dollars can be used at the discretion of the Council as an opportunity fund to build an economic development arsenal of tools that currently is nearly empty.

#### 4. Conduct a capital campaign feasibility analysis for TEDA

**Observation:** Currently, 100 percent of the TEDA budget is derived from public funds, and those funds are from the existing fund balance. TEDA's budget has fluctuated over the last several years based on the political climate from policymakers on whether they have felt TEDA has been effective or ineffectual. Economic development—and the support thereof—are often the first to be cut from local budgets when financial difficulties arise. But, those economic development programs throughout the United States that are the most successful are well funded, true public-private partnerships with funding from both sectors and led from the private sector.

**Recommendation:** TEDA should engage outside counsel to conduct a feasibility analysis to see if acquiring funds from the private sector would allow TEDA to operate as a true public-private partnership. We do not, however, recommend the feasibility analysis to occur until year three of this five-year plan, so as to allow TEDA and its new leadership to prove its value.

**Cost:** \$25,000 for the feasibility analysis

## CHAPTER 4: CONCLUSION



With its strong sense of commerce, community, and history, and being located along the Gulf of Mexico and in close proximity to New Orleans, Terrebonne Parish has much potential to claim a place for business within the Gulf Coast region.

This Economic Enhancement Strategy provides a roadmap for the Parish leaders to raise the bar. It provides long-term structural investments to ensure that Terrebonne can mitigate current challenges and better leverage its assets. The Strategy also calls on the Parish leadership to take on catalytic initiatives to strengthen the community's product inventory. Such strategic steps will help Terrebonne differentiate itself and attract the target business sectors and similar activity.

In order to redirect the Parish's trajectory for growth, leadership will need to be proactive and execute its economic development efforts differently. It will need to be a champion for long-term investments that will add to the Parish's product and quality of place, as well as ensure that sufficient resources are available to fund such goals.

Coupled with this change, TEDA and the Parish will need to be more outward-facing in its marketing and attraction effort. In addition to targeting the optimal sectors noted earlier in this report, the Parish must work with other economic development partners and stakeholders to create and encourage the development of the spaces and places where such activity will occur.

The end result will be to greatly improve the Parish's attractiveness for business and talent. The status quo is not an option. By taking on actionable and measurable plans to focus its entrepreneurial, retention, and attraction efforts, Terrebonne will become more competitive. With added focus, the Parish can make huge strides in its economic development efforts and build the community it desires.

\*\*\*

Garner Economics would like to thank the TEDA staff, the focus group participants, and the residents who took the time to complete the electronic survey. The staff's feedback, compilation of data, information, and openness and willingness to explore various opportunities to strengthen operations have contributed to the richness and rigor of this enhancement strategy.

## RECOMMENDATIONS SUMMARY

The results of this work create an economic development strategy for Terrebonne Parish that will be a key to the Parish’s future success. By taking proactive action to set its own trajectory, Terrebonne Parish can ensure that it builds economic opportunities for its residents, businesses, and future residents. The following is a summary of the recommendations offered in this strategy. (These were developed given the analysis and assessment taken during the first two phases of the project.) This strategy is a five-year plan and the schedule noted below was created to reflect a five-year timeline.

Strategy	Description	Actions	Timeline
Enhance the Product	Product improvement initiatives to ensure Terrebonne is in a competitive position to attract, retain, and grow the types of companies and industries it desires	1. Create a culture, programs, and support infrastructure for entrepreneurship in Terrebonne Parish.	2017–2019
		2. Establish an Airframe and Power Plant (A&P) certificate program at Fletcher Technical Community College	2018
		3. Develop hangar facilities to attract MROs and aircraft assembly operations.	2019–2022
		4. Create a plan to improve gateways into the Parish.	2017–2018
		5. Funding: Create sales tax allocation districts or utilize tax increment financing more effectively.	2017–2019
Tell the Story	Product marketing actions for Terrebonne to share the economic dynamism of the Parish with target prospects and talent	1. Enhance the TEDA website to address the needs of location consultants and potential investors.	2017
		2. Modify the Parish “Bayou Country” brand specifically for TEDA and its external outreach.	2017
		3. Enhance the Parish’s marketing collateral, media, and public relations efforts.	2017
		4. Actively solicit and provide information to site-location consultants.	2017–2022
		5. Develop a Terrebonne community pride campaign.	2017–2018
		6. Create a cadre of TEDA Ambassadors to extend the Parish’s brand.	2017–2018



Strategy	Description	Actions	Timeline
Execute Effectively	Organizational adjustments that allow the Parish or TEDA to align its mission and focus on those areas that will directly impact the economic growth the community desires	1. Create a one-stop permitting office to streamline the permitting process and create an internal culture of “yes.”	2018
		2. Develop a realistic and sustainable incentive policy for the Parish.	2017
		3. Create a Project Opportunity Fund (deal closing fund).	2017–2019
		4. Conduct a capital campaign feasibility analysis for TEDA.	2020