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THE TRIANGLE'S MSAS & ECONOMIC DEVELOPMENT

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KEY TAKEAWAYS

Executive Summary

In 2022 the Raleigh-Cary and Durham-Chapel Hill Metropolitan Statistical Areas (MSAs) will be evaluated by the U.S. Office of Management and Budget (OMB) for combination into a single MSA. This required reassessment following each Decennial Census presents several opportunities and challenges for the Triangle. Additionally, there are opportunities absent of a combination decision to improve economic development, which can be executed regardless of the OMB decision. This report begins to answer the following question: what are the implications for MSA bifurcation and reunification for the Triangle and how can it improve in its economic development?

Tried and True

The Triangle has shown considerable economic growth in the past two decades. The foundation for continued effort to promote economic initiatives is strong.

Reunification Consensus

It is likely that reunification of the two MSAs will occur. The consensus among economic development stakeholders across the Triangle, with specific reservations, is that a recombined MSA would improve the area's economic development.

Housing Risk

A considerable social and political risk centered around a potential loss of federal housing vouchers needs to be considered if MSA reunification occurs.

Time Sensitive

The OMB will determine MSA reunification in 2022. Regional leaders of the Triangle will need to put forth a plan of action in response to this decision.

Key Economic Factors

Economic development initiatives necessitate regional cooperation in terms of transportation, communications infrastructure, and workforce development to fully utilize existing resources and promote growth within the Triangle.

Equity Considerations

High-level economic development tends to leave out equity considerations. There is considerable room to include marginalized voices and equity frameworks.

METHODOLOGY

Our analysis draws from previous literature on economic development within the Triangle, original data analysis, and personal interviews with a multitude of stakeholders within the Triangle, including politicians, academics, and economic leaders in the area (a full list of the interviewees can be found in the appendix). Qualitative and quantitative analysis were used in the formation of the three conceptual bins that frame our discussion, which are detailed in the graphic below. These methods were critical in determining how the OMB decision to divide the Raleigh-Durham MSA into two separate MSAs impacted the Research Triangle's competitive efforts in economic growth.

The Triangle's Statistical Profile

Utilizing economic and site selection screening criteria, we asked if others see the potential within the Triangle that we see ourselves.

The Triangles of the Triangle

With communication and transportation infrastructure, and workforce development as our economic drivers, we analyze our economic potential and competitive status.

Federal Funding

Analyzing two federally funded programs, Housing Grants and Urban Area Security, we identify potential risks and opportunities.

CALL OUT BOXES



Pertinent information and statistics will be displayed using the lightbulb icon throughout the document.



Case studies will be labeled with the page icon. These will detail similar regions or promote useful examples of successful policies to drive forward economic development in the Triangle.



Equity callout boxes are marked with hand icons. Conversations around equity are becoming increasingly prevalent in social and political discussions. These frameworks are valuable in raising up the voices of marginalized populations. Sidebars marked with the hand icon will reference ways in which politicians, community leaders, and economic developers can frame the discussion and analyses of MSA bifurcation and economic development through an equity lens.

BACKGROUND

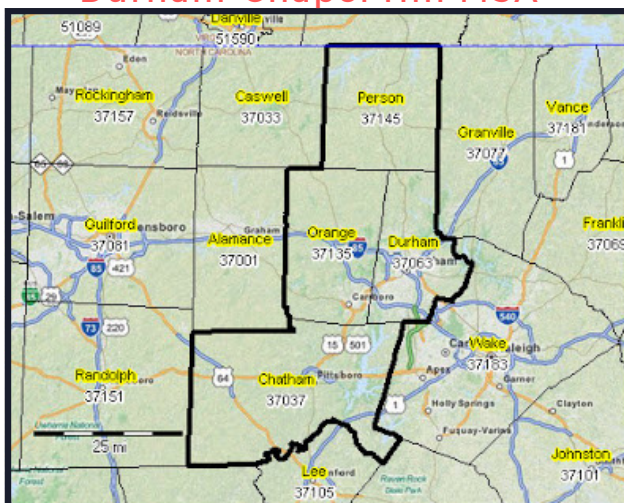
Measuring the Triangle's—Raleigh, Durham, and Chapel Hill, also known as the Triangle—statistical metrics is a complex task mired in statistical boundaries of separation. The Office of Management and Budget (OMB) is responsible for setting the parameters for Metropolitan Statistical Areas (MSAs) and uses U.S. Census Bureau data to designate MSAs decennially. [1] The designation of MSAs allows for ubiquitous identification of a single metropolitan market's population, growth, economic trends, and commercial climate. For this reason, MSAs are an important and common data point used by the federal government for the allocation of federal programs, by commercial entities when selecting locations to expand or invest, by sports teams when selecting franchise locations, and private citizens when evaluating labor market opportunities in metropolitan areas.[2]

Do others see us as we see ourselves?

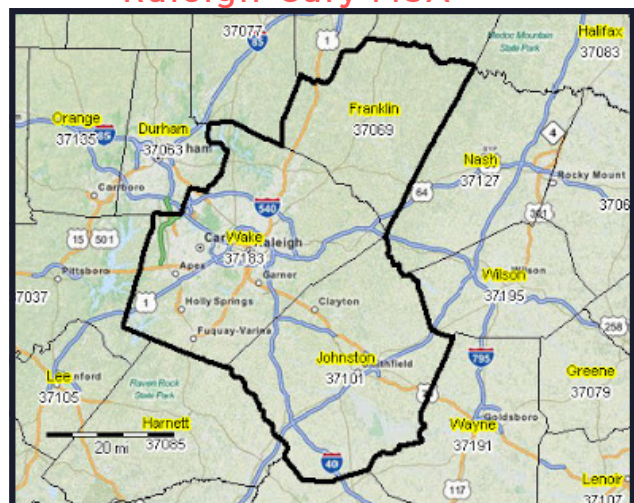
Prior to 2003, the Triangle was designated as a single and unified MSA—Raleigh-Durham.[3] At the time, the OMB considered the Triangle as three key population centers, within one commuter belt, less than 25 miles apart, with significant economic/employment interchange occurring (>25%) between the populations.[4]

Post 2003, the Triangle was split into two statistical areas of population, median income, and economic potential. Overnight, the Triangle's metrics used to allocate federal program dollars, recruit firms and talent, and drive regional cooperation changed while the Triangle itself stayed relatively the same.

Durham-Chapel Hill MSA



Raleigh-Cary MSA

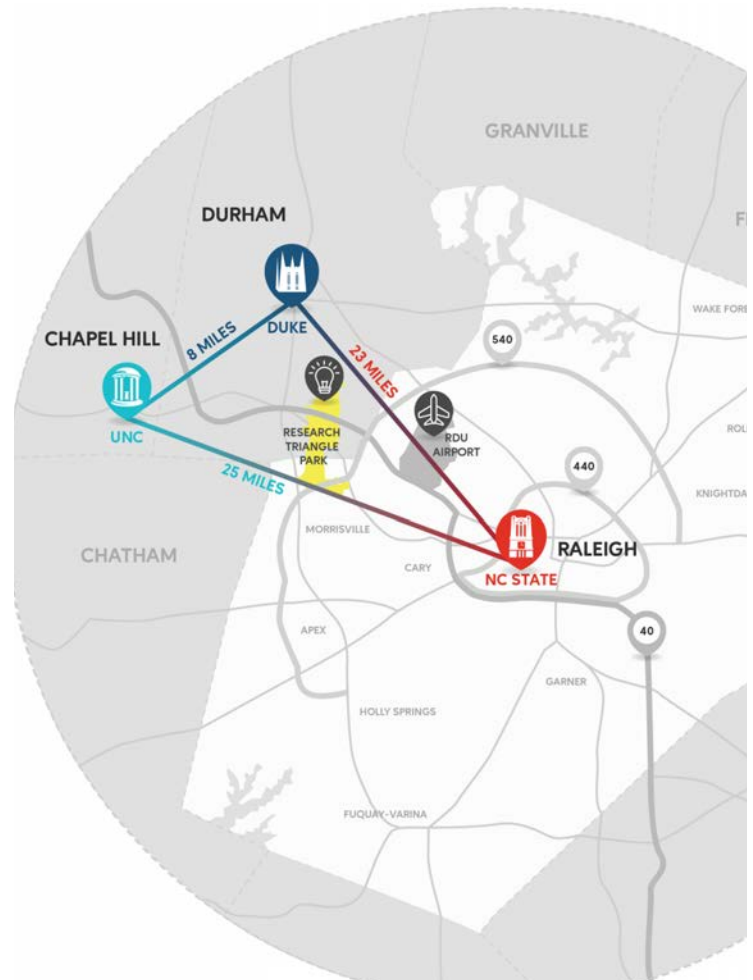


BACKGROUND - MSA DEFINITIONS

The Triangle - The cities of Raleigh, Durham, and Chapel Hill are colloquially referred to as *the Triangle* or *the Research Triangle* because of its proximity to three major research universities—Duke, the University of North Carolina at Chapel Hill, and North Carolina State University—as well as being a hub for technology, biotech, and life sciences corporations like IBM, Cisco, IQVIA, Google, RTI International, and Fujifilm.

Metropolitan Statistical Area (MSA) - The general concept of a metropolitan statistical area is that of an area containing a large population nucleus and adjacent communities that have a high degree of integration with that nucleus. The classification provides a nationally consistent set of delineations for collecting, tabulating, and publishing federal statistics for geographic areas. To be considered an MSA, one or more counties must contain a city with 50,000 or more inhabitants. Outlying and contiguous population centers can be included in the MSA if there is an economic interchange of 25% or greater, meaning individuals that live in one delineated area work in another.[5]

American Community Survey (ACS) - the American Community Survey helps local and federal officials, community leaders, and businesses understand the changes taking place in their communities. It is the premier source for detailed population and housing information about our nation. ACS Data is used to evaluate and delineate MSA designations, based on five-year rolling averages.[6] The most recent census data is scheduled for release December 9, 2021.



The 'Triangle'

Who uses MSAs?

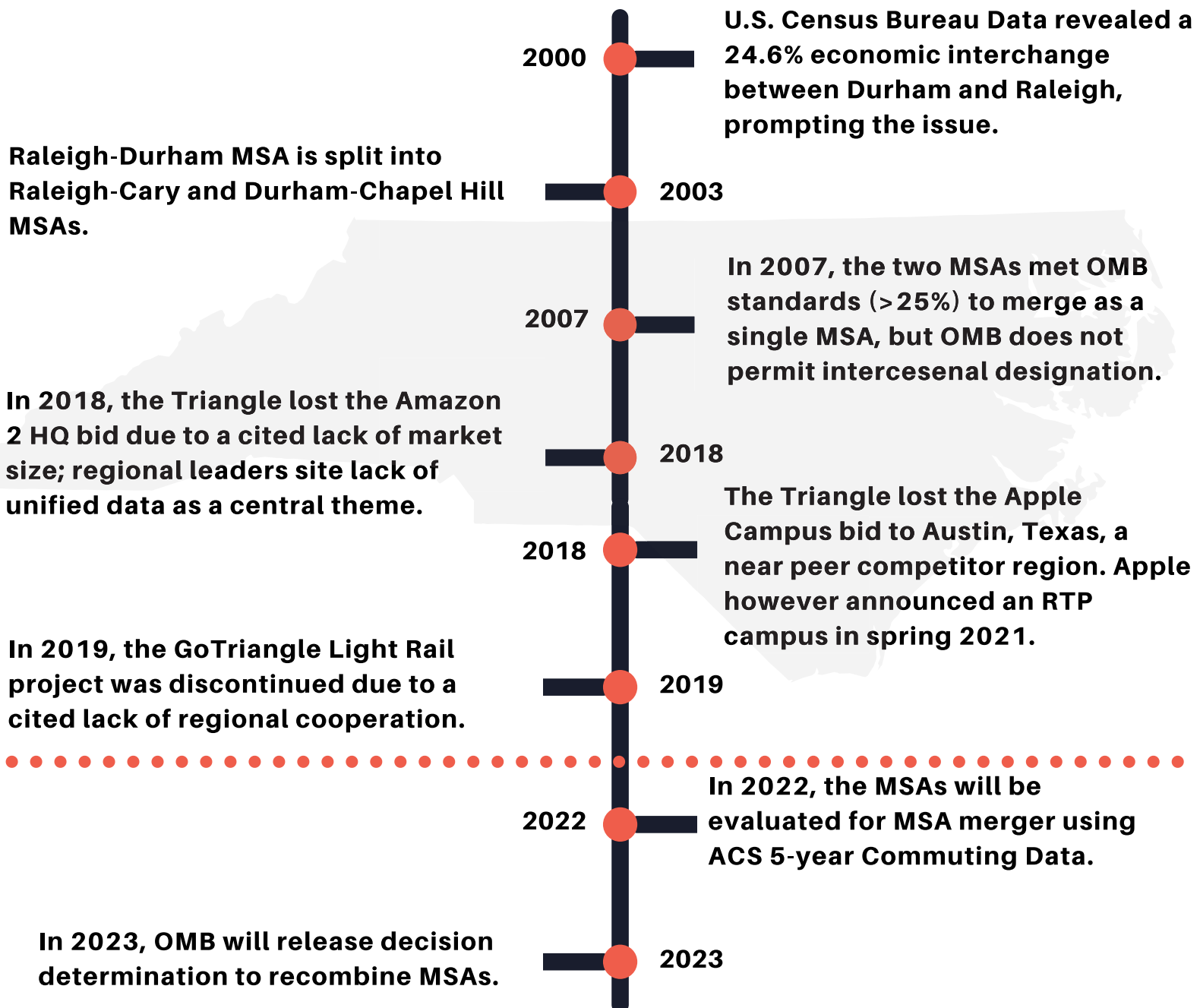


- Federal Budget Programmers**
- State Budget Programmers**
- Transportation Planners**
- City Planners**
- Site Selection Consultants**
- Banking Industry**
- Sports Franchise Industry**
- The American Citizen**

BACKGROUND - TRIANGLE TIMELINE

2003 was a seminal year in the Triangle's history for economic development, when the OMB identified a decrease in the economic interchange between Raleigh and Durham, NC.[7]

Subsequently, the Raleigh-Durham MSA was divided into the present-day Raleigh-Cary and Durham-Chapel Hill MSAs. In spite of returning to previous levels of economic interchange in 2007[8], the MSAs remained separate due to procedural rules and processes. In the end, being evaluated as two non-contiguous economic markets has prevented recruitment of several top-tier firms, ceding development opportunities to competing innovation and research metropolitan areas.



OUR STATISTICAL PROFILE

What does the data say?

MSA data is often used as a filter to set thresholds such as with population size or economic growth. With two separate MSAs, the Triangle can often fail to cross the statistical thresholds needed for site selection consideration, such as if the minimum population is set at 1.5 million.

Pre-2003 Raleigh-Durham MSA ranking:

- 40th in Total Population
- 9th Fastest Growing MSA



Source: U.S. Metropolitan Area 1999-2000 [9]

"We are in a growth mode and looking to compete with Austin and Nashville. The bifurcation puts Raleigh and Durham into smaller pools of smaller fish, like Madison, Wisconsin and Richmond, Virginia." --Scott Levitan, President & CEO, Research Triangle Foundation

Post-2003 MSA Bifurcation Raleigh-Cary was ranked:

- 42nd in Total Population
- 6th Fastest Growing MSA



Durham-Chapel Hill was ranked:

- 92nd in Total Population
- 46th Fastest Growing MSA

Source: U.S. Census Bureau 2000-2010 [10]

The 2003 bifurcation into two distinct MSAs had immediate and long-run impacts on the comparative statistical ranking of both Raleigh and Durham with other major metropolitan areas. The Triangle ceded statistical ground to innovation and research competitor metros like Austin, Salt Lake, Nashville, and Seattle--all of whom continue to outrank our MSAs across the statistical board.

"Having two MSAs to represent The Triangle does not portray the statistical reality of the region. The Research Triangle Park is one of many economic centers of The Triangle." --Michael Hogan, Economic Development Analyst, RTI International

Having combined statistics would put the Triangle on the radar during site selection processes. The new MSA would compare very favorably to other MSAs in terms of economic potential. This would propel the Triangle MSA ahead of other regions like the Nashville, Indianapolis, Las Vegas, and Charlotte MSAs.

A combined MSA would currently rank:

- 36th in Total Population
- 2nd Fastest Growing MSA



Sources: U.S. Census Bureau; RTI International [11]

THE STATISTICS - HYPOTHETICALS

The table below demonstrates the Triangle represented as two separate and distinct MSAs, each with varying size and economic potential, as well as a hypothetical combined MSA. Columns represent how firms, sports franchises, investors, and available workforce recruits would see the Triangle when "googling" metropolitan statistics.

Column four is the hypothetical reality of how those same prospectors could see the Triangle. First, the hypothetical reality pushes the Triangle into a more competitive market. Second, legislators should note the change to median household income, which will create housing equity issues that we will address later.

Amazon HQ2 Project



Nearly two years after the Triangle lost Amazon HQ2, NC economic developers produced a post-mortem to analyze the reasons why. The primary reasons identified were size and transportation. Ultimately, the team determined that the former is a direct result of MSA delineation and the latter is an indirect result.

"On paper, we don't compete well. We look like two separate markets, which isn't the case. When we get everyone in the same room, they finally start to see us the way we see ourselves. But it takes a lot of work to get past the MSA divide." --Scott Levitan, President & CEO, Research Triangle Foundation

	Raleigh-Cary MSA	Durham-Chapel Hill MSA	Raleigh-Cary-Durham-Chapel Hill MSA (hypothetical)
Population (2018)	1,362,540	637,501	1,999,091
National rank—population (2018)	42	96	36
Population percentage change (2010–2018)	19.70%	12.60%	17.30%
Similar MSAs by size	Oklahoma City, OK Jacksonville, FL Richmond, VA	Provo-Orem, UT Madison, WI	Austin, TX Nashville, TN Indianapolis, IN
Private-sector employment (2019)	544,389	248,147	792,536
Private-sector employment growth (2015–2019)	13.60%	10.30%	12.60%
Gross metro product (2018)	\$83.66 billion	\$54.69 billion	\$138.35 billion
Median household income (HUD, 2020)	\$63,363	\$53,042	\$59,869*
50% median household income threshold	\$31,681	\$26,521	\$29,934
HUD median family income (2020)	\$94,100	\$90,900	\$93,200*

**Calculated as a weighted average of the population*

Multiple Sources: RTI International, U.S. Census Bureau American Community Survey 2018 1-year estimates, U.S. Department of Housing and Urban Development, U.S. Office of Personnel Management, U.S. Bureau of Labor Statistics, U.S. Federal Reserve Bank of St. Louis FRED

THE TRIANGLES OF THE TRIANGLE

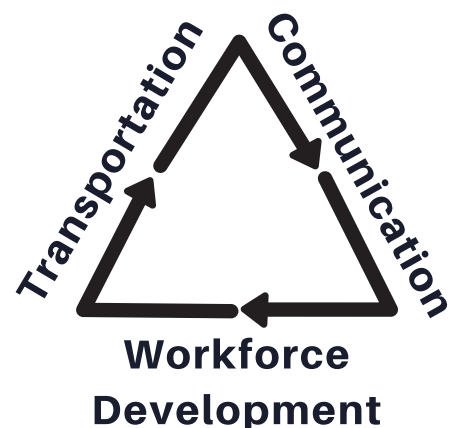
The Triangle's Three Drivers of Economic Development

As Judy Martz said, "Everything has to do with geography and geography has to do with everything." The Triangle includes three counties, four mid-size market cities, three major research universities, an international airport, and the largest research park in the United States--all within the same 96 square miles. The population centers of Raleigh, Durham, Chapel Hill provide 2.1 million of available workforce labor. The Raleigh-Durham International Airport connects our population centers with 62 non-stop connections to other areas of innovation and research development.



Duke University, the University of North Carolina at Chapel Hill, and North Carolina State University anchor The Triangle and give it a competitive edge in research, workforce development, recruitment, and prestige. The triangle of universities provides the research facilities, an educated workforce, and attracts major technology firms like Google, Fujifilm, GlaxoSmithKline, Lenovo, SAS, IBM, Redhat, and others.

Ralph Waldo Emerson poetically stated, "A creative economy is the fuel of magnificence." The key to a creative economy is establishing an environment, grounded in our geography and unique educational anchors, that promotes economic blooming at an exponential scale. Transportation and communication infrastructure, combined with top-tier workforce development are the conditions required to sustain an economic spring.



THE TRIANGLE - TRANSPORTATION

A 2020 report on the Economic Impact of Public Transportation Investment demonstrated that each \$1 billion invested annually into public transportation yields a \$5 billion increase in GDP. This equates to about 49,700 jobs per billion invested at current wage rates. Public transportation that allows employees to reach an employer supports the Triangle's fully developed workforce since Raleigh, Durham, and Chapel Hill are very geographically dispersed.[12]

There is another ongoing project that is being studied to create "The Triangle Commuter Rail" that would provide transportation for residents of the Triangle. The rail would provide transportation within Wake and Durham counties. Those two counties in addition to Orange county passed a half-cent sales tax to invest in transit improvements. Regional partners including the North Carolina Railroad Company inquired whether the project could also expand to Johnson, Selma, Orange, and Mebane to the commuter rail line. This project along with potentially reinvigorating a light rail project could provide a large economic boost to the Triangle and offer the workforce reliable transportation as the region continues to grow.

A Texas A&M university study in 2008 studied the impacts of light rail construction on investment within Texas. They found that development projects totaled around \$4.9 billion in costs. As a result, an additional \$4.26 billion was invested from external sources. This shows that investment into transit, such as light rails, provides a large opportunity for regional marketability and external funding.

Source: Texas Transportation Institute [13]

"If we had a combined MSA, we could also combine MPOs and NC DOT districts and plan our transportation efforts regionally." --Aaron Nelson, President and CEO, Chapel Hill-Carrboro Chamber of Commerce

As the Triangle has developed, the primary source of transportation has been the road systems for privately owned vehicles and bus systems. The developed road system could be integrated with other developing sectors of the gig economy to use as a transportation solution by leveraging Uber and Lyft contracts for the Research Triangle Park, specifically.



"For years, GoTriangle invested \$750,000 per year for busses in RTP. Ridership was 110 people per day. We need to look at NexGen transportation technology that carries low risk. RTP contracts partnerships with Uber and Lyft within the RTP geofence." -- Scott Levitan, President & CEO, Research Triangle Foundation

THE TRIANGLE - COMMUNICATION

North Carolina is ranked 18th, nationwide, in terms of public broadband access. Moreover, 33.1% of North Carolinian residents have access to fiber-optic internet service, which is a significant amount ahead of the 25% national average.[14]

	Broadband Connection Ranking (NC)	Fiber Access
Cary	11th	92%
Chapel Hill	55th	65%
Durham	22nd	58%
Raleigh	16th	74%

Source: Broadband Now, North Carolina [15]

Internet connectivity lends itself to workforce development within the Triangle. However, there is unequal access to broadband. Internet access is important as education becomes more digital and firms move their workforce to remote positions. The Triangle needs to look no further than COVID-19 to understand how important connectivity can be to our students and our workforce.

The expansion of fiber is another infrastructure improvement to drive regional marketability. Raleigh and Cary may be more attractive to firms due to larger fiber access. Discrepancies in fiber access will drive inter-regional competition rather than cooperation.

"We are currently playing 'no huddle offense' with our communications infrastructure. Several "players" are executing local communications efforts, but there is a coordinated, regional communications plan." --Aaron Nelson, President and CEO, Chapel Hill-Carrboro Chamber of Commerce

Firms that have privately built and managed communications infrastructure have seen exponential gains on their initial investments. Cities do not typically own their telecommunications infrastructure. However, the Triangle can pursue opportunities--where it makes sense--with the MCNC North Carolina Research and Education Network to develop communications infrastructure to spring up multiple "gig cities."

Chattanooga - "The Gig City"

Chattanooga determined that in order to automate anything a robust telecommunications infrastructure would be required. To develop a robust architecture, the city of Chattanooga purchased existing infrastructure and invested in it to deliver city-wide access. Chattanooga was one of the first cities in the United States to offer gigabit internet access to the entire city. As a result, the city became a hub for many start-up corporations and attracted new residents from Austin, Manhattan, and San Francisco. Chattanooga became known as "the gig city".



THE TRIANGLE - WORKFORCE DEV.

In 2019, over half of the state's employers reported hiring difficulties and 60% of STEM-related industries report hiring difficulties--the highest of any industry in the state.[16] STEM employers cited a low number of applicants combined with a lack of experience and soft skills as the top reasons they faced difficulties hiring workers.

While the Triangle is doing better than most North Carolina regions, North Carolina as a whole will need to improve in its development of a STEM-focused workforce. This discrepancy leads to firms outsourcing labor by recruiting, and in turn, could dissuade a firm from investing in North Carolina if they fear the workforce will not meet their needs. Many of these technical skills are developed in community college. An investment in STEM skills and a more-developed pipeline from primary education would assist North Carolina in creating a highly-skilled workforce, and it would reduce the level of out-of-state recruitment required.

"A unified MSA would have a significant impact on workforce development boards by putting The Triangle in a better position to attract economic development targets. For example, look at the Amazon HQ2 project--we were just too small on paper."

--Brian Holland, Chairman, Capital Area Workforce Development Board

Perceived labor market size and availability played a significant role in Amazon HQ2's decision to devalue Raleigh from the site selection process. The company planned to hire 50,000 engineers and software developers, which would have been a boon for economic growth, periphery business development, and development for the region. The Triangle will increase in its appeal when unified with more available labor being reflected in the data. Even unified, the Triangle should develop their workforce to fit the industries the region wishes to attract.

An Equitable Workforce

As the Triangle markets itself to attract jobs and investment, there is potential of the workforce being sourced from non-native North Carolinians. This has the potential for a crowding out of housing, jobs, and resources. Development of the Triangle's workforce would mitigate these potential risks and promote greater integration of the Triangle with its surrounding communities



FEDERAL FUNDING

The OMB has stated in their mission that MSA designation and statistics should not be used in determining federal funding.[17] The designation of MSAs and the aggregation of population demographics have however been used in the provision and disbursement of funds through federal grants. There is no established channel or procedure to determine all of the programs that use MSA data to determine funding.

Consequently, it is unclear how much federal grant money amounts would change given a reunification of the MSAs. Some programs only require that the MSA be defined, others use relative MSA statistics to determine funding, and many still do not use MSA statistics at all. RTI International and the Brookings Institute submitted a report to the Research Triangle Regional Partnership regarding some of the implications of the reunification of the Raleigh-Cary and Durham-Chapel Hill MSAs. They provided a high-level analysis of federal grants related to housing and housing finance, health and human services (HHS), education, Homeland Security, and Economic and Community Development. Their results imply that there are few immediate implications on federal grant money, with a notable exception being changed from the Department of Housing and Urban Development programs. Further research uncovered that there are potential changes in federal funding coming from the Urban Area Security Initiative Program.

Housing Vouchers

Combining the MSAs results in a relative change in median income across the region. This change in the region's median income could result in a shifting in the threshold of eligibility for housing assistance, affecting individuals making between \$25,000 and \$35,000 annually.[18] The RTI and Brookings institute analysis predicted an increase of 11,000 vouchers in Durham-Chapel Hill and a decrease in 18,000 vouchers in Raleigh-Cary.[19] The resulting 7,000 lost vouchers would be detrimental for those individuals who previously benefitted from the program.

Housing Equity Risk



Housing within North Carolina, and particularly the Research Triangle Area has historically been a charged topic. There is a considerable loss of an estimated 7,000 housing vouchers in the Research Triangle if the MSAs are recombined. Left unaddressed, political and social backlash would surely occur within the two constituencies. Many interviews with economic and political stakeholders around the area have independently brought the housing voucher issue to the forefront as the single largest issue in MSA unification.

FEDERAL FUNDING

Urban Areas Security Initiative Program

The Urban Areas Security Initiative (UASI) Program is a Federal Emergency Management Agency (FEMA) grant program that funds unique multi-disciplinary planning, operations, equipment, training, and exercise needs of high-density urban areas. The UASI program is intended to support the regional growth and urban expansion of developing metros by assisting in the creation of regional systems for prevention, preparation, protection, response, and recovery.[20]

Recipients of the UASI program are determined by examining the relative risk of the 100 most populous MSAs, defined by the OMB. Risk determination divides the MSAs into a high-risk category (Tier 1) and remaining MSAs (Tier 2); Tier 1 MSAs compete for 55% of the allocated funding and Tier 2 MSAs compete for the remaining 45%--roughly \$360 million in 2020--of allocated UASI funding.[21]

Although the Triangles MSAs qualify for Tier 2 MSA placement, being recognized as two statistically separate markets impedes natural competition with comparative MSAs like Austin and Nashville.

Moreover, the Durham-Chapel Hill MSA is at risk of losing Tier 2 placement as the 92nd ranked populous MSA. Given the geographic nature of how the Triangle straddles two MSAs, it confounds risk and emergency management planning to evaluate them separately. Uneven economic development may eliminate Durham-Chapel Hill from UASI qualification, creating mismatched ability to plan, prevent, and prepare for emergency management response.

UASI Tiers by MSA



Tier 1 MSA Examples:

- Los Angeles-Long Beach
- New York City-Newark
- National Capital Region

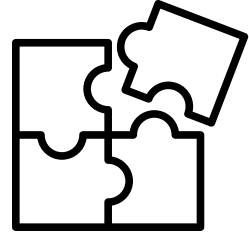
Tier 2 MSA Examples:

- Austin-Round Rock
- Nashville-Davidson
- Indianapolis-Carmel

Source: FEMA, DHS [22]



PUTTING THE PIECES TOGETHER



As the leaders of the Triangle develop a long-term plan for the economic development of the region, the following criteria will need to be addressed: Transportation and communications infrastructure undergird the Triangle's ability to compete, at parity, with other developing centers of innovation. Workforce development is essential to the recruitment of top-tier firms and is anchored in the Triangle's research universities. Institutional mechanisms for regional cooperation will need to be created. And all decisions should include an equity framework.

Equity

Equity permeates every facet of the Triangle's economic development. Whether it be uneven transportation access, inequitable broadband and fiber coverage, or imbalanced workforce development opportunities as a result of the former two. Moreover, we must acknowledge the foreshadowed political hurdles of MSA recombination. This challenge will manifest as a change of median income, impacting the Housing and Urban Development (HUD) housing vouchers program. Lastly, we must acknowledge the equity issue of security and the challenges presented to being properly represented for UASI funding if the Triangle remains two MSAs.

"The community voice, the minority voice, and the female voice can not be heard. They are not even in the room most of the time for these decisions." -- Delores Bailey, Executive Director, EmPOWERment Inc.

Transportation

Currently, the Raleigh-Cary and Durham-Chapel Hill MSAs each have their own metropolitan planning organization (MPO). These two MPOs are effectively responsible for the transit and transportation planning across the Triangle. They also represent a new opportunity for the two MSAs to collaborate and cooperate on a vital issue. Durham Mayor Schewel and Raleigh Mayor Baldwin are both Go Triangle board members, but no structural mechanisms exist to engender collaboration between the two MPOs.

Communications Infrastructure

A lack of regional communications infrastructure planning has resulted in uneven fiber and 5G coverage across the Triangle. Three-quarters of the Triangle resides in an underdeveloped broadband environment, creating obstacles to firm recruitment and workforce development.

PUTTING THE PIECES TOGETHER

Workforce Development

The Triangle has an underdeveloped local labor pool to draw from for technology-heavy industries. Moreover, unemployment hovers between 3-5% in North Carolina which is relatively low.[23] A congruent strategy will need to be developed on how to address this issue as the Triangle seeks to bring more firms to the region. While it is true that there is an influx in those migrating to the area, a better-developed education pipeline would lend itself to the overall goals for economic development. When looking at the different cities, Raleigh and Durham have relatively equal levels of educational attainment, but their unemployment differs. Raleigh has a 5.1% unemployment rate compared to Durham with a 6.6% rate.[24] It will be important to compare education and labor statistics as the workforce development strategy evolves.

MSA Naming Convention

If recombination of the two MSAs occurs, the issue of what to name the newly created MSA could generate some political and civil friction. OMB will solicit local input for consideration to determine the combined MSA name. There are two likely choices that will be considered for the new MSA: Raleigh-Durham or Raleigh-Durham-Cary-Chapel Hill. The former restores a historical precedent and the latter recognizes Cary and Chapel Hill as a major economic centers of the Triangle.

A Tale of Four Cities



There is precedence for four names within an MSA title, however it is extremely uncommon. The Nashville-Davidson-Murfreesboro-Franklin MSA in Tennessee is one of the few examples. It includes 13 counties and is the 36th largest MSA in the United States as of 2019.



RECOMMENDATIONS

Most importantly, these recommendations are designed to alert regional leaders to key issues that are currently affecting the Triangle, as well as key issues should recombination occur. The first set of recommendations represent actions to be taken without regard for the possible MSA merger. These recommendations can be implemented now to address economic development issues stymying the Triangle's growth. The second set of actions will prepare the Triangle for a potential merger of the two MSAs by synchronizing the Triangle's efforts. Preparing for recombination now will prevent delay in adjusting to an OMB decision and afford time for true consensus to prevail in the event the MSAs are merged. Finally, the last set of recommendations represent actions that should be undertaken once an OMB decision is articulated to merge the MSAs.

Immediate Action

Establish a Triangle Blue-ribbon Committee to gather and analyze data from Durham's 2019 affordable housing referendum. The committee should produce a Triangle-wide study on how to apply the referendum and lessons learned with other Triangle population centers.

Commission a study on the benefits and challenges of combining the two Triangle MPOs to more effectively carry out the Triangle's transit vision. The study should also attempt to reconcile the three--Raleigh, Durham, RTP--transit authorities for better cooperation toward economic development.

Create an inter-mayoral advisory board with representatives from Raleigh, Durham, Chapel Hill, and Cary to focus on mutual executive action that promotes information sharing, coordinating proactive policies to recombination, and elevating the Triangle's economic competitiveness in site selection processes.

Assist local workforce development boards in reaching out to and assisting minority and/or women-owned small businesses with pandemic recovery.

RECOMMENDATIONS

Preparatory Actions for Recombination

Establish a MSA Recombination Committee to plan for the potential MSA merger. The committee should begin planning for OMB comment solicitation, MSA naming conventions, and policy impacts of the merger.

In coordination with the Triangle Council of Government, the MSA Recombination Committee should seek clarification on changes to eligibility for federal funding on Urban Areas Security Initiative and housing voucher grants.

Commission a project for updated Triangle branding strategy to reflect the Triangle's updated statistics, site selection status, and workforce recruitment strategy.

If Recombination Occurs

Create a new housing voucher program parallel to that of the federal grant program provided by the Department of Housing and Urban Development. The new program will then grandfather all voucher recipients that were lost due to the change in median income from MSA reunification.

Task newly created MPO, in concert with local and state legislators, to form transit strategy for new MSA.

MSA Recombination Committee to work with OMB to finalize MSA naming convention.

Utilize the inter-mayoral advisory board, in coordination with Research Triangle Foundation and Research Triangle Park, to launch the new marketing campaign for the Triangle.

APPENDICES

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A. PERSONAL INTERVIEWS

Interviewee	Position	Organization
Aaron Nelson	President and CEO	Chapel Hill-Carrboro Chamber of Commerce
Bill Bell	Former Mayor	City of Durham
Brian Holland	Chairman	Capital Area Workforce Development
Delores Bailey	Executive Director	emPOWERment, Inc.
Lee Worsley	Executive Director	Triangle J Council of Government
Mark Lawson	VP of Economic Development	Cary Chamber of Commerce
Mary-Ann Baldwin	Mayor	City of Raleigh
Michael Hogan	Economic Dev. Analyst	RTI International
Scott Langford	Ph.D. Candidate	UNC Chapel Hill
Scott Levitan	President and CEO	Research Triangle Foundation
Steve Schewel	Mayor	City of Durham

B. END NOTES

- [1] "Office of Management and Budget." Federal Register 75, no. 123 (2010): 8.
- [2] Federal Register 75; Chris Cirillo, "Birth of an Idea: The Creation of Research Triangle Park and Its Sustained Economic Impact on the Research Triangle Area – Urban Economics," April 2013, <https://sites.duke.edu/urbaneconomics/?p=899>.
- [3] Charles W. Wessner and National Research Council (US) Committee on Competing in the 21st Century: Best Practice in State and Regional Innovation Initiatives, North Carolina's Research Triangle Park, Best Practices in State and Regional Innovation Initiatives: Competing in the 21st Century (National Academies Press (US), 2013), <https://www.ncbi.nlm.nih.gov/books/NBK158811/>.
- [4] Cirillo.
- [5] Federal Register 75.
- [6] Federal Register 75.
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