Charleston Metro
Chamber of Commerce

Driving growth. Defining tomorrow.

CHARLESTON 2013
HANDPRINT
prepared by Next Generation Consulting

Table of Contents

Handprint Sponsors:

What Makes a Community "Cool?"

Have you ever visited someplace and thought, "I could see myself living here?"

Maybe it happened in Hawaii, where you envisioned learning to surf and living the life of a sun-drenched beach bum. Maybe it happened in San Francisco where you were swept away by the bustle, culture, and 1960s beatnik sensibility. Maybe it happened in Austin where the creative, rockabilly youth vibe is so, so strong. Or maybe it happened in a European, Central or South American city, where the senses - the food, the art, the fashion - are so strong, and the people are so beautiful.

Wherever it was, your reaction to that city came from your perception that living there would be a delight. Something about that city jived with you - with your values, with your perception of who you are, and with your ambitions. *Life would be better,* you sensed, *if you lived there.*

That emotional, perceptive connection to cities matters.

It matters because many people will tolerate high rents in cities they love. They will tolerate insane traffic in cities they're connected to. They will proudly raise their voice and straighten their backs when they tell people where "home" is.

The connections that people have to their cities matter.

And it's beginning to matter more and more.

> A city's "coolness" and its connection with its residents matter because the payoff is real. CEOs for Cities found that there is a $865 per capita economic dividend for every one percent increase in the percentage of college degree holders who live in your community. In the Charleston MSA, increasing the percentage of Bachelor degrees holders by one percent would have a $570,200,215 economic impact.

So what makes a city "great?" What factors give it that "stickiness" that makes it attractive to so many? And how can Charleston become the go-to place for young talent - those with the mobility to choose and the skills to make the region an even more prosperous one?

Measuring Quality of Life

Quality of life is more than a feeling. The things that people value in their cities can be categorized and measured.

Since 1998, we have studied the migration and work preferences of young talent, mostly college educated, in their 20s and 30s. What we've found is that talent migrate to cities that have high scores in several of the following indexes:

After Hours There's more to life than work. This index counts the places to go and things to do after work and on weekends.

Around Town How easy is it to get to where you want to go in Charleston? This index measures Charleston's "walkability," airport activity, commute times, carpooling and mass transit use, and more.

Cost of Lifestyle Students and young professionals are just getting started in their careers, and for many, affordability is key. This index includes variables in the cost of living index.

Earning High school guidance counselors tell children that they'll have between nine and eleven careers in their lifetime. The Earning index measures items like median income, unemployment, jobs in the knowledge-based sector, women and minority owned businesses, self-employed, and more.

Learning Is Charleston committed to high quality education, for all of its citizens? This index tallies educational expenditures, student-teacher ratio, bachelor degrees, high school attainment, Wi-Fi hotspots, and more.

Social Capital Great talent comes in every race, creed, and color. This index accounts for how open, safe, and accessible Charleston is to all people. It includes measures of diversity and crime, as well as farmers' markets and dog parks.

Vitality How "healthy" is Charleston? This index tallies things like air and water quality, food deserts, residents' health (e.g. obesity, access to recreational facilities, primary care physicians, etc.), and a city's focus on LEED and Energy Star projects.

In December, we released a report comparing Greater Charleston's quality of life scores to five other regions: Charlotte, NC; Savannah, GA; Nashville, TN; Austin, TX; and Raleigh-Durham-Chapel Hill, NC.

These five regions were hand-picked by the Charleston Metro Chamber leadership because the Chamber feels that Charleston can, should, and often is competitive with these regions. As important, these regions may have something to teach Charleston. Throughout this document, we refer to these five regions as your "peer MSAs[1]."

How does Charleston score in the seven quality of life indexes compared to its peers?

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1   "MSA" is an acronym for Metropolitan Statistical Index

Table 1: Overall Rankings

Rank	Peer MSA	Vitality	Earning	Learning	Social Capital	Cost of Lifestyle	After Hours	Around Town	AVG
1	Austin	6	9	5	7	8	6	10	7.3
2	Raleigh	8	6	7	7	5	5	5	6.1
3	Charleston	3	5	5	5	2	8	5	4.7
4	Savannah	3	2	7	6	3	6	4	4.4
5	Nashville	3	5	2	2	8	4	4	4.0
6	Charlotte	7	5	3	2	5	1	3	3.7

Overall, Charleston is ranked third, below Austin and Raleigh, and above Savannah, Nashville and Charlotte[2].

When we normalize the peer MSAs and compare Charleston to them, Charleston's clear strength (see handprint below) is in its After Hours index.

What does it all mean?

For Charleston to continue its recent growth streak, it must leverage its strengths, be strategic about its investments, and shore up its weaknesses. The key findings and recommendations you're about to read are based on three pieces of research conducted by Next Generation Consulting between January and November 2012:

• Charleston's "handprint." As you saw on the previous page, your "handprint" is a visual representation of how well Charleston scores in seven quality of life indexes. The data behind the handprint told us a lot about Charleston's strengths and challenges.

• Listening sessions. We listened to young professionals, employers, entrepreneurs, and creatives throughout the region. Some have lived in Charleston their whole life. Some moved to Charleston for jobs or to be closer to family. And some were "boomerangers" who were born or raised in Charleston, left, and eventually returned. All of them had interesting things to say about their city, and had ideas for how to make it better.

Charleston, SC

Vitality	3
Earning	5
Learning	5
Social Capital	5
Cost of Lifestyle	2
After Hours	8
Around Town	5

Peer Cities

Vitality	5
Earning	5
Learning	5
Social Capital	5
Cost of Lifestyle	5
After Hours	5
Around Town	5
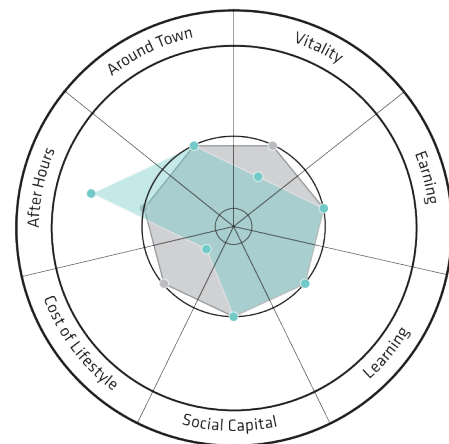
2   For further details on Charleston's scores, visit http://nextgenerationconsulting. com/index.php/resources/8886/

- Digging. We read *A Short History of Charleston* by your local, living historian Robert Rosen. We scoured bestplaces.net and other web sources to capture residents' and visitors' perceptions of Charleston. We read your economic development reports, your creative class reports, your OpportunityNext plan, your transit plans, your sustainability plans, and your downtown master plans.

And here's what we found…

Key Findings & Recommendations

We call these "key findings" because they are both urgent and important to Charleston's ability to attract and keep talent.

> Of course, we learned a lot of other stuff that didn't make it into this document, e.g. the sausage muffins at Burbages Grocer on Broad Street are divine. But attention spans are short, and we want to keep you focused on the issues that will strongly impact your ability to attract and keep smart, mobile workers who'll power your future prosperity.

Charleston's increasing traffic negatively impacts the region's quality of life.

"We chose Charleston for our North American headquarters in the early 1980s based on its strategic location and attractive lifestyle attributes. This area has grown dramatically since then, and traffic congestion is now negatively impacting our employees' commute times and overall satisfaction with their work life. If this region is to remain economically successful, investments in a world-class transportation system must be a top priority. These investments should not just focus on existing issues but prepare us to manage future growth as well."

— Matt Weismiller
President, Bechtold Corporation[3]

In focus groups, young professionals - especially those who moved to Charleston from other cities - admitted that Charleston is overly car-dependent. Your handprint results confirm this; the After Hours index found Charleston lower than its peers in the number of workers who use public transit, and lower than your peer MSA's in walkability scores.

What do we know about traffic trends and Charleston's future?

- Charleston is still growing, which will make "bad traffic" even worse if cars and roads are the only reliable way for residents to get around town.

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3   2012 Regional Economic Scorecard, http://crda.org/economicscorecard

- Commuting by car is the single daily activity most injurious to happiness.[4] If you want happy residents and employees, make their commute as pain-free as possible.

- The price of gas is expected to continue to increase, which will disproportionately impact service workers and young professionals who are typically at the bottom of their organizations' salary pyramids.

Bottom line: Moving Charleston from a car-dependent to a multi-modal transit system will improve air quality, increase commuters' happiness, create a platform for greater social and economic justice, and put Charleston on the map as a city that "gets it."

Recommendations:

1.1 Invest in, and insist on, a future-friendly, innovative multi-modal transportation system that combines federal, state, and local investments.

Getting people out of their cars and onto other forms of transportation requires a shift in behavior. Here are some ideas to jump-start the behavior change, and show next-gen talent that Charleston values all forms of transportation, not just cars:

> *What is a multi-modal system?*
>
> Multi-modal systems shift the focus from cars and roads, and spread more resources to safe and reliable walking, bicycling, and public transit.

1.2 Apply paint, signage and wayfinding to assist and protect cyclists. The Congress for New Urbanism has shown through multiple demonstration projects that painting "sharrows," bike lanes, and red boxes greatly increases motorists' awareness of bicyclists, resulting in fewer collisions and greater bike ridership. Well-marked bike paths and signs also assist bikers.

1.3 Invite young professionals to participate in a "Bus Rider Challenge."

1.4 When the regional transit plan is completed, hire a local design agency to layout the final report and visuals. Great maps and plainspoken explanations will enable understanding and galvanize support.

> Young Professionals of Omaha launched the first bus rider challenge in 2009. Which resulted in increased awareness among young professionals of the bus system's viability, and also gave the local mass transit authority valuable customer feedback. Today, the bus rider challenge has transformed to the Metro Area Commuter Challenge. Learn more here: http://www.omaha.com/article/20120708/NEWS/707099971

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4   http://scienceblogs.com/cortex/2010/03/30/commuting/

1.5 Work with following groups to make bus ridership a more aesthetically pleasing experience: the Council of Governments serving Berkley, Charleston and Dorchester County (BCD-COG), the Charleston Area Regional Transit Authority (CARTA) and Tri-County Link. Some examples:

- Lafayette, Indiana features the work of local poets inside their buses

- In Charlotte, North Carolina, public bus stops and buses feature the work of local artists

> *"The City of Charleston believes investing in the public realm with artistic infrastructure strengthens the creative spirit of individuals and the community, and demonstrates how the arts give expression to shared civic values and cultural identity."*
>
> *— Mayor Joseph P. Riley, Jr., C*

1.6 Start a Bicycle Benefits program among area retailers, to support local cyclists.

Bicycle Benefits is a progressive bicycling program designed to reward individuals and businesses for their commitment to cleaner air, personal health, and the use of pedaling energy in order to create a more sustainable community. The program's continual growth decreases parking demand, increases helmet use, and improves cyclists' safety and health by putting more people on bikes.

1.7 Support the completion of the Battery to Beach (B2B) bike path expansion.

Sixty-seven thousands residents live within a mile of the proposed B2B path, giving them a viable, non-car option for traveling safely to 18 schools and 40+ recreational areas within a two mile swath of the B2B path. Additional upside? $42 million annual economic impact.

Learn more: http://www.charlestonmoves.org/charleston-moves-research-project-b2b-route-can-add-40million-plus-annually-to-local-economy/

Charleston scored better than Austin and all of its peer MSAs in the After Hours Index (8) due to its higher scores in the number of full service restaurants, local music shows, independent coffee shops, and breweries and brew pubs.

King Charles II of England, for whom Charleston was named, was called "the Merry Monarch" because of his great affection for the theater, actors, playwrights, horse racing, music, the arts, fine food, and good drink.

Ol' Charles would be pleased that even today, the people of Charleston enjoy a culturally rich and diverse range of options, from fine dining at FIG to beer-and-apps at The Charleston Beer Exchange. And that's just the food. The weekend arts, culture, and sporting festivals attract visitors and residents alike.

How can Charleston leverage its superior strength in this index?

Recommendations

2.1 Design an after hours app.

Whether you're visiting Charleston for the weekend, relocating here from another city, or have been a long time resident, one thing's sure: you rely on your smart phone to stay in the loop. Currently the Charleston Convention and Visitors Bureau, the Charleston Post & Courier, and the Charleston City Paper all have events listings. But two of them don't allow you to choose multiple kinds of events, e.g. dance and theater, and the third's listings are inaccurate, e.g. a "Barbecue Cruise" came up as an arts event.

A clean, accurate after hours app and website would allow users to locate accurate, timely events by distance, type of event, family-friendliness, and more.

Do512.com is one example of a local events listing.

2.2 Create an Arts Sampler in partnership with the Charleston Young Professionals (CYP), to expose more young professionals to the city's cultural offerings.

> What is an Art Sampler?
>
> It's a sampler subscription to the region's dance, theater, opera, and music. Participating arts organizations agree to offer a set number of tickets to the sampler, and also agree to host a little something special, after the performance or event. It's a great way to expose young professionals to Charleston's art scene. The financial commitment is low, the intimidation factor is nil and young professionals get a chance to hear from the artists, directors and staff who make their livings in Charleston's creative economy.

The Art Sampler is a wonderful way for Charleston's traditional arts organizations to introduce the next generation to the magic and creativity of the performing arts.

> Best Practices: Indy Hub's Passport to the Arts: http://www.indyhub.org/what-we-do/passport-to-the-arts/ and Detroit's Passport to the Arts: http://dp2a.org/

Key Finding #3

The poor reputation of Charleston's K-12 school isn't completely accurate, but it scares young parents who are detractors of the public schools.

There are certain brands that have a hard time overcoming their image. McDonald's, for example, will never be equated with "good health" even though their menu includes salads, smaller portions, and healthier options.

Sometimes, a reputation sticks, making it hard to overcome.

This is exactly the pickle the Charleston County Public Schools are in. The region has some of the best (and some of the worst) schools in the state. Unfortunately, the word on the street is that all the schools are bad. This has a particularly chilling effect on young parents. If they're considering relocating to Charleston with a young family in tow, the reputation of the schools may impact their decision. And if young singles live in Charleston but then marry and start their family, they may leave.

Yet, we're bullish for two reasons:

It's easy to defend the argument for good schools with results like these:

> *"The state released report card ratings Tuesday for every district and school, and the news generally was good. The five ratings range from a low of "at risk" to a high of "excellent," and the number of schools and districts receiving an "average" rating or higher increased from last year.*

> *"Graduation rates for schools and districts also were released Tuesday, and many saw improvement. The state graduation rate improved 1.3 percentage points to 74.9 percent, which is the highest it has been since 2008."*

> *— Diette Courrégé Casey, "South Carolina report card ratings, graduation rates for schools mostly contain good news," Post and Courier, November 14, 2012*

And your 2012 School Board election makes it clear that voters are ready for more accountability and even more results.

Now is the time to reframe public education's bad rap, and replace it with the reality. Now is the time to rebrand Charleston County schools as effective - even exceptional - places for parents to send their kids.

Recommendations

3.1 Streamline and simplify the application process for K-12 schools

This may require a new education czar or a SWOT team of new school board trustees. But until the application process is fixed, young parents will remain confused, and they'll resort to talking negatively about the Charleston schools.

To support this recommendation, the School Board might consider creating a web-based platform and communication plan to talk directly with parents about K-12 options and application processes.

The mommy blogosphere is already talking about Charleston's K-12 schools. So go where the parents are, and create an honest, useful online forum where parents and educators can talk together and with each other about their options and applications.

3.2 Align and support the local EDGE Academies and the region's Cradle to Career initiatives.

Charleston is embarking on several exciting education initiatives, which will further reinforce the region's commitment to K-12 education. The Charleston Cradle to Career initiative is based on the transformative work underway at Strive in Cincinnati and Alignment Nashville.

3.3 Launch a social media campaign to publicize the region's education news and hold the School Board accountable for underperforming schools, especially those in the downtown district.

Research shows that since 2004, South Carolina's school board elections have not been impacted by student achievement.[5] That needs to change. (And maybe, with the 2012 school board elections, change has already started.) Either way, young parents may be the best-equipped to help make it happen.

A strategic social media campaign centered on (a) a student performance scorecard, (b) best practices in helping underperforming schools, and (c) news regarding student performance will help turn the tide towards greater accountability for Charleston's schools.

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5   http://educationnext.org/accountability-lost/

Charleston's Vitality Score needs a boost. The Charleston MSA scores lower than its peers in access to recreational facilities, energy star and LEED certified projects, adult obesity, and residents with low income and low access to food

For the next generation, food—especially locally grown, organic food—is increasing in importance. Several local restaurants are evolving towards this trend, moving away from traditional, fried comfort foods to more fresh, local, and seasonal fare.

But changing residents' attitudes towards vitality will take more than a few tweaks. It could take an entire generation (or more) for more sustainable practices to take root.

Recommendations

4.1. Ask Mayor Riley to lead a "Mile with the Mayor," a monthly run or walk that gets residents out on the region's paths and trails. Each walk can conclude with a round of (healthy) beverages at a local, family friendly eatery. This is a natural extension of the Mayor's Lighten Up Charleston campaign (and hey! he's a runner!)

Best practice: Mayor Betsy Price (Fort Worth Texas) hosts a weekly bike ride around Fort Worth. http://fortworthtexas.gov/TourDeFortWorth/?id=95160

4.2 Increase residents' access to fresh food, and address Charleston's food deserts (in pink on the map on the right.)

Within this recommendation, there are two sub-recommendations:

Address your food deserts. Food deserts are places where residents are more than a mile from fresh food, and as you can see on the map above, the issue is prevalent. And relatedly:
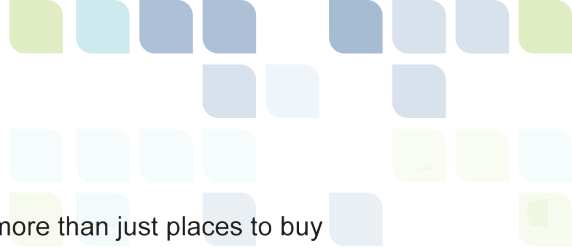
Increase farmers' direct access to consumers by increasing the number of farmer's markets and Community Supported Agriculture (CSA) shares.

Currently, Charleston has ten farmer's markets within a 20 miles radius[6]. For

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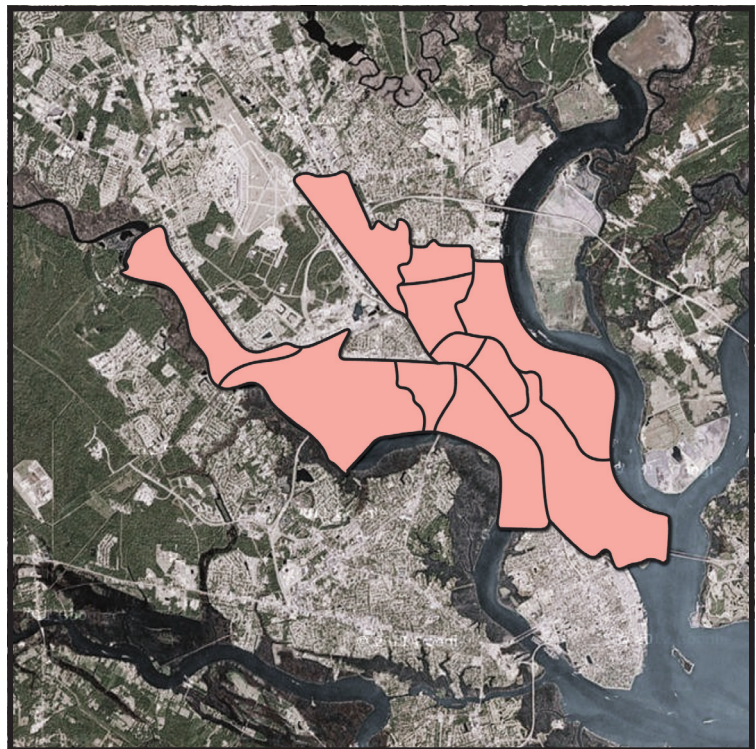
6   Source: United States Department of Agriculture: http://search.ams.usda.gov/farmersmarkets/default.aspx

comparison, Austin has fifteen. Farmers markets are more than just places to buy vegetables.

- Farmers markets build social capital. Studies show that people have ten times more conversations at farmers markets than they do at traditional grocery stores.

- Farmers markets help create local jobs. A 2011 Economic Research Service report found that fruit and vegetable farms selling into local and regional markets employ 13 full time workers per $1 million in revenue earned. Comparatively, fruit and vegetable farms that are not selling locally employed only 3 full-time workers per $1 million in revenue.

- Farmers markets keep more money in the local economy. A series of case studies by Civic Economics shows that for every dollar we spend at a large chain, about 15 cents stays in the area, while locally owned enterprises like farms trap 30 to 45 cents.

Best practice: In Chicago, the Fresh Foods Bus brings fresh produce into the city, to make sure those who live in food desserts are not limited to convenient fast food, but instead have access to healthy foods.

4.4 Strongly support the sections of the regional land use plan that include greenbelt protection and waterfront recreation, dining, parks and trails.

4.5 Create a Wellness Scorecard for the region, based on the County Health Ranking's best practices, and work with regional stakeholders to set goals and improve scores. See Charleston's scores here: http://www.countyhealthrankings.org/app/south-carolina/2012/charleston/county/1/overall

Key Finding #5

Charleston is a more expensive place to live than many of its peers. This is because its incomes are lower than average and its costs of living (especially housing) are higher.

As we learned in our focus groups and city visits, Charleston has a very "nichey" economy. There are some high paying jobs in very focused industries, but overall the community lacks a robust middle class. The current job market offers very few higher paying job opportunities in mid to higher levels of management.

"I've lived in Mount Pleasant / Charleston Area for 2 years now, and the cost of rent / homes continues to amaze me. When you compare what the average citizen makes versus what the average cost of rent or home ownership is, it seems impossible for an average person making an average income to live here."

Brian, as reported on BestPlaces.net

Recommendations

5.1. Increase the diversity and alignment of higher education offerings to the region's current and targeted industry and workforce needs:

• Advanced Security and IT
• Aerospace
• Biomedical
• Wind Energy
• Advanced Materials
• Creative Design
• Drivetrain and Power Systems
• Logistics and Software.[7]

5.2 Support the Developers Council to simplify the regulatory/approval process, so that more affordable homes can be built for Charleston's workforce.

The Developers Council was created in 2001 and is being reconstituted to address Charleston cost of housing. Their key finding to date: the city and county's regulatory and approval process adds the cost to homes.

5.3 Award a "Best Place for Young Professionals to Work" award to local businesses that are providing engaging places for young professionals to work.

This award could be a subset of a pre-existing best place to work competition, or it could be hosted by Charleston Young Professionals. The award should focus on the workplace perks proven to attract and retain the next generation, including but not limited to: flex-time, remote work, engaged management, professional development, and fun.

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7   Source: OpportunityNext, http://www.crda.org/pdf/opportunity_next/Opportunity_
           Next_Executive_Summary.pdf

Key Finding #6

Charleston's "Lowcountry" sensibility is charming and hospitable, but beyond the first impression, it can be unwelcoming to those who aren't from Charleston (or who aren't white, religious, or in traditional marriages and families).

Young professionals have more global, diverse connections than ever before. In their lifetime, America's largest cities will all become primarily nonwhite. The marketplace is global, our "friend" networks are international, and the next generation wants Charleston to reflect the openness they value.

Openness, diversity, and esprit de corp are also the life blood of the startup scene that the Charleston Digital Corridor is trying to foster. Brad Feld, author of Startup Communities: Building an Entrepreneurial Ecosystem in Your City suggests six factors that are required for great startup cities. Of the six, Charleston's Lowcountry disposition affects two: the "Patriarch Problem," where Feld says the problem is the city is ruled by "old white guys," and "Do I know you?" in which a community is suspicious of newcomers. Both are poison to startup cultures.

How can Charleston extend and deepen their renowned Southern hospitality to those who are "nontraditional" in Charleston?

Recommendations

6.1. Educate nonprofits and civic groups about Get On Board as a source to help them find and place young professionals on their boards of directors. If possible, expand the number of seats available for the Get On Board training.

6.2 Ensure that the images that circulate about Charleston include images of the region's vast diversity. Consider a billboard campaign called, "I am Charleston" modeled after Austin's I am ACC campaign.

6.3 In concert with the local Pecha Kucha series and/or Charleston Digital Corridor's Friday's at the Corridor, begin to introduce and address issues related to race, gender expression, and other facets of diversity.

6.4 In collaboration with the Diversity Leadership Institute, launch an HR taskforce committed to exchanging best practices in workplace diversity, and getting one Charleston area employer on the HRC's best places to work list and/or the Diversity Inc Top Companies to work for by 2014.

6.5 Encourage Charleston Young Professionals to identify whether taking a stand on issues like diversity and equality are part of their role in helping Charleston move forward.

This all sounds great. But what can I do?

Great question, glad you asked.

You can do a lot of things. Let's start with the easy stuff.

First, vote. Vote for local candidates who are smart, have some moxie, and aren't afraid to make smart bets on the future, even if it's "different" than what's always been done. America is in a period of stagnation right now, but Charleston is bucking that trend. Cities that make smart bets and keep investing now will emerge as leaders when the economy recovers. Charleston has a terrific tailwind right now, and smart elected officials making smart investments will keep the momentum going in the direction of progress.

You can vote in other ways, too. With your time, with your influence, with your words, and with your money. For example, if you think Mayor Riley's doing a bang up job, tell him. Or leave a positive comment online when you read an article about something cool happening around town. Participate in the bus rider challenge or ask your HR department to join the consortium committed to best practices in diversity.

Go where your energy is.

If you belong to an organization like Charleston Young Professionals, ask their leaders, "What parts of this plan should we adopt as part of our advocacy platform?"

And if you're the organizing kind, consider stepping up and taking the lead on one of the initiatives you're most passionate about. Contact the Charleston Young Professionals at 843.577.2510 or www.charleston-yp.com.