

**NORTH CAROLINA'S REGIONS:
TRANSITIONING TO THE KNOWLEDGE ECONOMY**

*SUMMARY PROCEEDINGS OF
REGIONAL FOCUS GROUP MEETINGS*



Document 3

NORTH CAROLINA BOARD OF SCIENCE AND TECHNOLOGY

September 1999

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North Carolina Board of Science and Technology

**NORTH CAROLINA'S REGIONS:
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Summary Proceedings of Regional Focus Group Meetings**

The N.C. Board of Science and Technology, chaired by Governor Hunt, is conducting a statewide visioning and real options planning process entitled Vision 2030 to strengthen North Carolina's competitiveness in the new economy. The Kenan Institute's Office of Economic Development (OED) has assisted in this effort, first by preparing a 1998 report entitled *At the Crossroads: North Carolina's Place in the Knowledge Economy of the 21st Century*. This report examined the strength of industry and university-based R&D in the state, especially in terms of emerging market opportunities and federal R&D priorities.

One of the recommendations in the 1998 report was that successful economic development in the 21st century will be based on the principle of "thinking globally, acting locally." North Carolina (and other states) can best seize opportunities presented by the new knowledge economy by mobilizing resources at the local and regional level. In particular, it needs to ensure that universities, community colleges, government agencies, not-for-profit organizations and private industry work together using local and regional resources strategically and efficiently.

To test the strength of these relationships at the regional level in North Carolina and begin to assess regional competitive advantages, OED conducted a regional analysis in Summer 1999. First we compiled a preliminary profile of each of the seven economic development partnership regions' strengths and challenges for the knowledge economy. Then, through focus groups in each region, OED elicited the visions and priorities of key public officials, business leaders and education administrators. (A list of the actual participants in each regional focus group is attached. Not all invitees were able to attend.) The Board of Science and Technology had asked that OED work with the partnerships to host these meetings. In each region, a group of about 20 leaders was convened over either lunch or breakfast in the regional partnership offices or other central location.

The regional focus groups, summarized below, were convened to begin a dialogue that will continue after the Vision 2030 conference with a series of larger regional conferences. The group size and representation at the August meetings were designed to be small enough for a focused discussion and to provide perspective on the activities of the region's leadership as it looks towards its activities in the new millenium. The focus group sessions are being used to provide guidance for further discussion and development of critical issues.

SNAPSHOTS OF THE REGIONAL MEETINGS

These brief summaries, as well as the data that follow, are organized by region from west to east.

Despite the many workforce and technology infrastructure challenges facing the *AdvantageWest* region, the overall tone of the discussion was hopeful and energetic. The region's strong leadership, which includes Partnership, community college, university and business members, recognizes the need for the region to connect to economic engines outside the region. Those include the Atlanta and Greenville corridors, the automotive cluster in Tennessee, and the research universities in the Triangle. The region has long recognized topography as a major issue among its barriers to traditional economic development and sees the knowledge economy as its best opportunity for the future. The cost of the necessary infrastructure will be very high, however. A group of private and education leaders recently identified \$65 million in initial technology infrastructure and programmatic investment needs for the region to be competitive. Moreover, the challenges of developing the skilled labor force needed for the knowledge economy are seen as acute in many of the rural areas throughout the region.

In contrast to other regions, the discussion at the *Carolinas Partnership* regional session was more focused on urban issues, in general, and business opportunities for Charlotte, in particular. Attendees nonetheless appreciated the diversity of the less populous communities within the Carolinas region and the quality of life they contribute to the region. In addition to information technology (IT), which is a growing sector, they noted the continued importance of high-technology manufacturing in the regional economy. Manufacturers of textile equipment and automotive parts, as well as other major employers including airlines and banks, are large consumers of high-tech products. A key challenge for the region is the shortage of appropriately trained mid-tech personnel and especially engineers. Regional leaders want UNC-Charlotte to be classified as a Research I university to help foster a stronger knowledge economy. The region is also striving for a greater entrepreneurial identity that includes stronger venture capital and publicity initiatives. Some of the region's perceived best business opportunities are for linkages with the South Carolina cities along the I-85 corridor. Participants urged state policymakers to make substantial investments in both the universities and community colleges and to recognize that different policy approaches may be appropriate for urban vs. rural regions.

The general attitude of the *Piedmont Triad* regional group was that the region has good opportunities to enhance its strong economic base of manufacturing by making it more high-tech. The impending arrival of Federal Express has already stimulated many of the region's leaders to work together better to prepare for the massive changes expected. Local government and chamber officials are among the more visible leaders in this region, and they are very interested in raising the technology profile of the Triad. The sentiment was that community colleges are an important player in economic development in the region but that the UNC institutions need to be more involved. They expressed some frustration about the Triangle region as the locus of most of the state's science and technology investment and as the sole focus for the R&D spinoffs from the flagship universities of UNC-CH and NCSU.

The *Research Triangle* regional group acknowledged the region's tremendous assets for the knowledge economy and its great strides in science and technology relative

to much of the state. While the region is ahead of other places in North Carolina in knowledge resources, it is losing its global leadership position as other states and nations commit more resources to knowledge infrastructure. The Research Triangle group more than other groups compared the region to technopoles outside the state. Texas, Kentucky, Virginia, Georgia, and South Carolina were all mentioned for their more aggressive action. Moreover, the legislature and citizens sometimes do not appreciate the importance of a strong Triangle for the health of the state's overall economy. Regional leaders indicated they need to do a better job of marketing the Triangle as an engine of growth for the whole state and of making linkages between this region and others.

The general tone of *Southeast's* discussion was dynamic and hopeful, despite the group's recognition of the region's many challenges. The need to develop a more skilled labor force is acute in many of the rural areas throughout the region. Basic education levels, as well as electronic literacy, are quite low and high school dropout rates are high. Nonetheless, as Dupont and other businesses have noted, the local workers generally have a strong work ethic. Some of the best economic development opportunities identified were better leveraging of the research strengths of the universities, the quality of life, the military presence, and processing industries (food, chemicals, wood products) that can improve their value added through the application of technology.

The consensus of the *Global Transpark* regional group was that the region needs to make substantial improvements in workers' education and skill levels to prepare them for the knowledge economy. Entrepreneurial activity is strong and growing, but is hampered by low educational attainment, even more than by inadequate capital. The tone of the discussion was pessimistic yet determined, and the group showed unity on most issues. The medical and applied technology capabilities of Eastern Carolina University were recognized as assets for the entire region, though engineering programs are also needed. The group saw the kickstarting of the Transpark and better connections with the military bases as key catalysts to technology-driven economic development in the region.

Despite a history of weak economic performance in much of the *Northeast* region, the tone of this regional group's discussion was very hopeful and energetic. The recent investments by Nucor and others, combined with a strong tourism industry, infrastructure improvements, a commitment to establish a Marine Sciences Center at ECSU, and the galvanizing efforts of the Partnership have all contributed to a sense of optimism about the region's economic prospects. The greatest challenges for the region will be to bring about structural changes in all levels of education, to improve access to the Tidewater area of Virginia, and to establish and communicate ways to make the knowledge economy relevant to the region's traditional rural economy and agricultural base. The group agreed that the region's strategy for knowledge-based economic development must be built upon the current foundations of quality of life and by leveraging the resources of many small communities for regional problem-solving.

ARE WE READY FOR THE KNOWLEDGE ECONOMY?

In the three eastern regions of the state, each group observed that the knowledge economy—and its need for more skilled workers willing to adapt to rapid changes through lifelong learning—must be made more relevant and appealing to people who are accustomed to agricultural and traditional manufacturing economies. Participants noted the need for cultural change, in part through better marketing of the career possibilities for young people in mid-tech professions. Throughout the state, but especially in these areas, the citizens need examples showing how science and technology innovation has been applied in agriculture and processing to create better paying jobs¹. The leaders worried that many citizens think of the new economy as being about information technology companies and therefore irrelevant to rural areas. Many adults in rural areas in the east still feel alienated by the technology revolution. In some areas, dislocated workers appear not to be interested in retraining, even if it is free, suggesting that better outreach is needed. Until people use technology—for example, the Internet—for themselves, to do something that they want to be able to do, it is irrelevant and even intimidating.

Interestingly, the alienation factor was not mentioned as a major hurdle in the AdvantageWest region, which is as rural as the east. We know from prior work that the same fear of technology and sense of irrelevance was pervasive there a few years ago. The Connect NC project, funded through the Appalachian Regional Commission for most of the AdvantageWest counties, was instrumental in providing basic outreach and education to citizens about telecommunications technology and the economic and other opportunities it can enable. Currently, the regional leaders recognize that their strong base of traditional companies is an asset for the knowledge economy because those firms are important consumers of information systems, software, and R&D as they upgrade their processes to be more competitive.

Charlotte leaders made a similar observation about existing employers—in their case, automotive, textile, transportation and financial services companies—being large consumers of technology. Similarly, Piedmont Triad leaders acknowledged some of the same challenges as the eastern regions of understanding and communicating how knowledge can be applied to add value to traditional manufacturing, and not just information technology jobs.

In the most urbanized regions of the state, the discussion of the need for cultural change had a different twist than in the east. In the Charlotte and Research Triangle regions, which are considered the high-technology magnets of the state, most leaders already appreciate technology as a driver of economic development; however, in these areas the participants discussed the need to create a more entrepreneurial and innovative

¹ Many such examples exist. In the Southeast, Dupont's investment in a Teflon plant in Bladen County hinged on being able to access chemists at the University of North Carolina. In the GTP region, Eastern Carolina University provides technical assistance in applying technology to agricultural and food processing businesses. In the Northeast, RJ Reynolds is cultivating local sage and using science knowledge to produce sage oil for export to perfume factories in France.

culture. These regions were benchmarking themselves against Austin, Silicon Valley, Boston, and other global competitors that have stronger cultures of entrepreneurship.

Because of their different economies, each group had somewhat different suggestions for how to foster such a culture. The Research Triangle group suggested:

- improving the rate of tech transfer from universities by mobilizing graduate students from business and engineering programs;
- making better connections between large companies and entrepreneurs to help foster industrial R&D;
- recruiting a few young IT companies to help jumpstart cultural change; and
- creating Internet-friendly tax policies.

The Charlotte group suggested:

- promoting UNC-Charlotte to a Research I university;
- developing comprehensive educational programs for potential local entrepreneurs;
- publicizing homegrown business successes;
- recruiting talent from economies with similar sectoral strengths (e.g., financial services innovators in New York City); and
- creating entrepreneur-friendly communities within the region.

Leaders in both these regions noted the need for better inter-modal transportation systems, including bike paths, to emphasize the high quality of life on which good entrepreneurship depends.

Table 1 shows some of the similarities and differences among regions. It summarizes the current conditions seen by participants as important determinants of their region's readiness for the knowledge economy.

HOW STRONG IS THE “INNOVATION TRIANGLE” IN EACH REGION?

One purpose of the preliminary regional assessment was to determine the extent to which various collaborations and partnerships are in place to foster innovation and quick responsiveness to changing business conditions. The “Innovation Triangle” among government, education, and business tends to be strong in the states and nations with which North Carolina competes².

Table 2 shows web page linkages as just one proxy for the degree of active connection between each economic development partnership and its education, business and government partners. These data are based on web sites as of August 1999.

² The “innovation triangle” is referred to by George Kozmetsky of IC² Institute in Austin as “civic entrepreneurship.”

Table 1. Conditions related to readiness for the new economy mentioned in regional focus groups

Condition	Advantage West	Carolinas	Piedmont Triad	Research Triangle	Southeast	Global Transpark	Northeast
Brain drain	•		•		•	•	•
Economic restructuring and worker dislocation	•		•		•	•	•
Low education levels in some areas	•		•		•	•	•
Shortage of skilled labor		•		•			•
Changing demographics – more Hispanic, more elderly		•	•			•	
Difficulty establishing critical mass for educ. & training	•						•
Cultural gap with new economy			•		•	•	•
Inadequate/uneven technology infrastructure	•					•	•
Inadequate basic infrastructure	•				•	•	•
Need for more venture capital, entrepreneurial culture	•	•		•		•	
Stronger ties to other states than NC in some areas	•	•					•
Difficulty competing on national/global level		•	•	•			
Environmental challenges		•		•		•	•

Table 2. Linkages between economic development partnerships and others

Region <i>Web site</i>	Is the regional partnership linked to these web sites?				
	Universities in region	Community colleges in region	County ED organizations	Chambers of commerce/ Businesses	State, federal and non-profit agencies
AdvantageWest <i>Awnc.org</i>	Yes	Yes	Yes	Searchable directory	NCDOC; agribus., tourism, film, crafts orgs.
Carolinas <i>Charlotteregion.com</i>	No	NCCCS only	Yes	Charlotte chamber	NCDOC, Charweb
Piedmont Triad <i>Piedmontriadnc.com</i>	Yes	Yes	Yes	Chambers; employer list	NCDOC, fin.resources
Research Triangle <i>Researchtriangle.org</i>	Yes	No (general mention)	Yes	Raleigh and Durham chambers; banks; utilities	NCDOC, MCNC, NCEITA, CED, Biotech Ctr.
Southeast <i>Ncse.org</i>	Through data book	Through data book	Info page on each county	List of businesses	Info on Fort Bragg
Global Transpark <i>Gtp.org</i>	No (mention only)	No (description only)	Info and maps for each county	List of major employers	GTP Auth.; list of military assets
Northeast <i>Ncnortheast.com</i>	No	No	Info page on each county	Chambers; banks; tourism orgs.; employer list	No

This is clearly a limited view of linkages, but since business prospects and their site selection consultants increasingly use the Internet to make location decisions, it is a reasonable first test. Another simple test is to consider the involvement of university and community college officials as economic development partnership board members. In the AdvantageWest, Piedmont Triad, Northeast and Southeast regions, there are no university or community college members of the partnership board for 1999-2000. The Carolinas Partnership includes the UNC-C chancellor as a board member. The Research Triangle region includes an official from one of the public universities and one from a community college. The Global Transpark region includes an ECU representative and a community college system representative on its Economic Development Committee (separate from its Executive Committee). Partnerships do not appoint their own board members; they are appointed by the Governor, the House Speaker, and the Senate President Pro-Tem. Nonetheless, the sparseness of knowledge institutions on partnership boards is an indicator of a need for additional strengthening of these linkages.

These simple tests, reinforced by the focus group discussions, suggest that each of the regions of the state must do more to cultivate productive relationships among business, government and education. For example, although the role of community

colleges in training the labor force has long been understood as an asset for economic development, partnerships with UNC or other universities are not an integral part of economic development practice, especially in the three eastern regions. Understanding the importance of the research, education, and technical assistance services of universities as drivers of the knowledge economy is but one element of the outreach effort needed to evoke the cultural change mentioned earlier.

In fairness to the Partnerships, their legislated role is as marketing organizations for their regions, not necessarily as one-stop shops for everything related to economic development. Each region has other institutional focal points of active leadership in economic development in general, and in some cases, in science and technology policy. Table 3 summarizes those organizations for each region, as identified in focus group discussions.

Table 3. Examples of high-profile leadership in each region for the new economy

<i>Advantage West</i>	Knowledge Coalition of business, education and government leaders who have identified the region’s critical technology infrastructure needs and are seeking federal and other funding to make these investments.
<i>Carolinas</i>	Advantage Carolina, a branding task force chaired by the mayor of Charlotte to develop a 10-year strategy for education, workforce development and information technology. Also the Center for Applied Textile Technology and UNC-Charlotte’s Cameron Applied Research Center.
<i>Piedmont Triad</i>	Winston-Salem’s technology roundtable; Guilford Tech’s nationally recognized workforce development programs; the Z. Smith Reynolds Foundation.
<i>Research Triangle</i>	The Center for Entrepreneurial Development, Centennial Campus, Research Triangle Park, Biotechnology Center
<i>Southeast</i>	UNC-Wilmington’s applied research programs; Dupont; the Electronic Commerce Resource Center and the Partnership, both working on developing opportunities from Fort Bragg.
<i>Global Transpark</i>	Eastern Carolina University’s roundtable with community colleges, industry and local government, growing to include more counties
<i>Northeast</i>	Partnership’s Committee of 1000 business leaders, including Nucor

WHAT ROLE FOR POLICY?

Many of the recommendations for policy action that came from the focus groups were to reduce existing barriers to collaboration among the nodes of the Innovation Triangle. Table 4 summarizes the key action items mentioned by each region’s participants.

Table 4. Recommended policy steps to foster science and technology-based economic development

Action item	Advantage West	Carolinas	Piedmont Triad	Research Triangle	Southeast	Global Transpark	Northeast
Invest heavily in univs. and CCs	•	•	•	•	•	•	•
Improve K-12 educ., including science, and its use of technology	•	•	•	•		•	•
Make substantial improvements in technology infra.	•				•	•	
Educate state and local elected officials about need for investment	•		•	•		•	
Do better “why technology?” outreach to citizens			•		•	•	•
Remove stigma of trade and mid-tech professions	•	•			•		•
Develop focused programs to assist entrepreneurs	•	•		•			•
Streamline the degree/center/pgm. approval processes of UNC General Administration	•	•	•	•		•	
Retool community college funding formulas to enhance college responsiveness	•	•	•	•	•		•
Repeal or amend Umstead Act to allow business use of NCIH	•	•			•		•
Capitalize better on military bases and trained labor					•	•	
Collaborate better regionally		•	•	•		•	•
Align all state services with same regions			•		•		

Some of these items simply require funding, and a lot of it. Leaders in AdvantageWest alone identified \$65 million in critical infrastructure needs, including both physical infrastructure and programs. Others require public relations efforts to shift

attitudes and culture. Still others require changing the statutory and regulatory incentive structures that impede responsiveness to rapid change. The funding of community colleges, which currently favors degree programs over technical training, is one problem. The long approval process for new UNC degree programs is another, as some community colleges are going out of state to get the technical degree programs they need. The Umstead Act prohibits business use of the North Carolina Information Highway, even in areas where public/private collaboration on distance learning via videoconference, for example, could be a great boost to economic development.

One of the recurring themes from the focus groups is that to be successful in the knowledge economy, North Carolina's regions must provide assistance and services to their existing industry and startup businesses. Though the Partnerships focus primarily on industry recruitment, much of the work in increasing competitiveness for the knowledge economy is product development, including new business startups using research innovations as well as technology process improvements for existing industries.

Another key theme is that regionalism is an important aspect of preparing for the new economy. Most of the regional groups recognized the value of the diversity of their counties in providing different attributes that affect the quality of life in the region. As companies become less dependent on fixed resources for production and can move anywhere, quality of life is an important determinant of economic growth potential. North Carolina's regional leaders are enthusiastic about building a new economy in each of the state's diverse regions that does not jeopardize that quality of life.

List of Attendees to Regional Focus Groups

AdvantageWest region

Wally Bowen
Mountain Area Information Network

Patricia Cabe
Handmade in America

Dale Carroll
AdvantageWest

Philip Carson
Adams, Hendon, Carson, Crow and Saenger

Jack Cecil
Biltmore Farms, Inc.

Richard Faulkner
Congressman Charles Taylor's Office

Russ Froman
Mars Hill College

Michael Geouge
Nantahala Power and Light Company

Cecil Groves
Southwestern Community College

Lanny Hass
Mountain Horticultural Center

John Houser
Wachovia Bank of NC

Patricia Ireland
AdvantageWest

Ron Leatherwood
Clark and Leatherwood (and AdvantageWest board)

Mike Littlejohn
NCSU/UNC-Asheville

Norm Oglesby
Tri-County Community College

Ray Rapp
Mars Hill College

David Reeves
Cason Companies

Tim Richards
WCU Mountain Resource Center

Allen Steinberg
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Trudi Walend
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Rita Wilkins
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Mike Williams
Performance Data

Carolinas Partnership region

Michael Almond
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Donald Altieri
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Jon Benson
Medical Optical Imaging

Mark Bernstein
Chair, Economic Development Board

Norman Cohen
Vice-Chair, Board of Science and Technology

Jerry Cole
Bank of America

Gene Deladdy
Carolinas Healthcare System

Mike Feldman
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Tom Flynn
City of Charlotte

Don Hathcock
BellSouth

Mark Heath
Carolinas Partnership

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Harry Leamy
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Jim Lemons
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Patrick McCrory
Mayor, City of Charlotte

Steve Mosier
Associate Vice Chancellor for Research, UNC-Charlotte

Terry Orell
Charlotte Chamber of Commerce

Tony Zeiss
Central Piedmont Community College

Piedmont Triad region

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Mayor, City of Greensboro

Gayle Anderson
Winston Salem Chamber of Commerce

Bob Annechiarico
BizNexus, LLC

Donald Cameron
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NC Technology Alliance

J.H. Froelich
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Tony Johnson
Winston Salem State University - SBTDC

Tom Lambeth
Z. Smith Reynolds Foundation

Louis Moore
BB&T

Charles Pressley
Alamance Community College

Earnestine Psalmonds
NC A&T University

Norman Samet
Chair, Piedmont Triad Partnership

Rebecca Smothers
Mayor, City of High Point

John Walser
City of Lexington

Research Triangle region

Rex Adams
Fuqua School of Business, Duke University

Ted Conner
Durham Chamber of Commerce

Mark Crowell
Technology Transfer and Research, NCSU

Scott Daugherty
Small Business and Technology Development Center

Monica Doss
Council for Entrepreneurial Development

John Green
Capital Broadcasting Company

Charles Hayes
Research Triangle Regional Partnership

Victoria Haynes
Research Triangle Institute

Bruce Howell
Wake Technical Community College

William Ingram
Durham Technical Community College

Claude McKinney
Centennial Campus

Fran Meyer
Technology Development, UNC-Chapel Hill

Doug Miskew
IBM

Tom Rabon
Lucent Technologies

Jim Roberson
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Harvey Schmitt
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Bob Sullivan
Kenan-Flagler Business School, UNC-CH

James Williams
School of Business, NC Central University

Southeast region

Paul Butler
Southeast Partnership

Leslie Cox
N.C House of Representatives

Harry Foley
Southeastern Community College

Paul Friday
Concurrent Technologies Corp.

Hannah Gage
Cape Fear Broadcasting Company and Board of Governors, UNC-Wilmington

Joseph Grimsley
Richmond Community College

Hamilton Hicks
Mayor of Wilmington

Barry Hudson
Dupont Corporation

Connie Majure
Wilmington Chamber of Commerce

Marie McCoy
Southeast Partnership

Gene Miller
Chair, Southeast Partnership Board

Donna Payne
Hester, Grady, Hester, Greene and Payne

Margaret Rudd
Margaret Rudd and Associates

Jane Smith
Century 21

Dave Stuart
MAP Systems, Inc.

Bob Tyndall
UNC-Wilmington

Bob Warwick
McGladrie and Pullen

Global Transpark region

David Barker
Global Transpark Commission

Lonnie Blizzard
Education and Training Center

Woody Brinson
Duplin County EDC

James Cauley, III
Rose, Rand, Orcutt and Cauley

John Chaffee
Pitt County EDC

Al Delia
Regional Development, Eastern Carolina University

Tom Feldbush
Eastern Carolina University

Walter Fitts
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Tom Greenwood
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Oppie Jordan
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Glynda Lawrence
Pitt Community College

Robert Masters
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John McNairy
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Patricia Noble
Lenoir County Public Schools

Phyllis Owens
Carolinas Gateway Partnership – Nash County

Karen Pettit
Lenoir Community College

Johnny Rogers
N.C. Department of Commerce

Charles Russell
Pitt Community College

Jordan Whichard
The Daily Reflector

Dawn Wovoris
Global Transpark Development Commission

Bob Wydell
Pitt Community College

Northeast region

Bryant Brooks
North Carolina Power; and Chair, Committee of 1000

Mickey Burnim
Elizabeth City State University

Cheryl Byrd
Dare County Commissioners and Sustainable Development Initiative in Albemarle

Tom Campbell
Pasquotank County Cooperative Extension

J.C. Cole
District Court Judge

Bill Culpepper
NC House of Representatives

Moncie Daniels
Dare County Commissioners

Jeremy Esposito, reporter

Roger Lambertson
Economic Development Director, Currituck County

Sylvester McKay
College of the Albemarle

Phil McMullan
Northeast Partnership

Jeanne Meiggs
RESA

Martin Nadelman
Martin Community College

Charles Shaw
Northeast Partnership

Ravindra Sinha
Elizabeth City State University

Raymond Sturza
Dare County Planning Dept.

Jim Taylor
Northeast Partnership and Chowan County Commissioners

Rick Watson
Northeast Partnership

Dorson White
East Carolina Bank

Fred Yates
Mayor, Town of Winfall