



Workforce Investment Board
ALEXANDRIA • ARLINGTON

Comprehensive Economic Development Strategy (CEDS) 2011-2016

Prepared by:



CEDS Committee
ALEXANDRIA • ARLINGTON

July 1, 2011

This Comprehensive Economic Development Strategy (CEDS) was prepared by the Alexandria/Arlington Workforce Investment Board's CEDS Strategy Committee and CEDS Working Committee, which included representatives from the jurisdiction's economic development organizations, the Alexandria Economic Development Partnership and Arlington Economic Development. These organizations work with a diverse array of local business and community groups and lead the region's economic development agenda.

Alexandria/Arlington Workforce Investment Board (WIB)

The Alexandria/Arlington Workforce Investment Board (WIB) was established by the [Workforce Investment Act of 1998](#) to support the employment and training needs of the City of Alexandria and Arlington County (Local Workforce Investment Region #12). The mission of the WIB, in partnership with the City of Alexandria and Arlington County governments, is to build a workforce development system that prepares our local labor force for the 21st century.

Alexandria Economic Development Partnership (AEDP)

The Alexandria Economic Development Partnership leads efforts to grow the tax base, diversify the economy and attract and retain businesses and organizations in Alexandria, Virginia. Founded in 1992, the Partnership joins its collaborators in defining and marketing Alexandria as a creative, diverse, knowledge-based community with a high quality of life.

Arlington Economic Development (AED)

Arlington Economic Development is dedicated to the preservation and enhancement of an economically competitive and sustainable community, and the creation of exciting, diverse and amenity-rich places. AED provides visionary leadership and superior services to Arlington's business community, its tourism industry and its real estate development.

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Chapter 1 Regional Profile

This chapter will provide an overview of the neighborhoods, residents, economy and infrastructure of the Alexandria/Arlington region. Alexandria and Arlington have benefited from a strong economic base and a highly educated workforce that have enabled the region to maintain lower levels of unemployment than the nation and the Commonwealth of Virginia during the 2007-2009 recession. However, this relative economic security is not uniformly distributed among the residents and neighborhoods in the region and significant long-term regional economic challenges exist.

1.1 Community Overview

The City of Alexandria and Arlington County together form the first ring, inner suburban region of Northern Virginia. The jurisdictions are united in a history and a set of key assets and economic challenges that is unique among the jurisdictions in the greater Washington, DC region. In the late 19th and early 20th centuries, the City of Alexandria and Arlington County emerged as Northern Virginia's first streetcar suburbs, residentially-focused communities in which residents commuted to work in the District of Columbia via private streetcar lines. The history of the Alexandria and Arlington region in the second half of the 20th century is similar to other first ring suburbs around the nation. In the immediate period following the Second World War, the jurisdictions experienced significant population growth but by the 1970s both had begun to experience a loss of population as local retailers and residents were lured to larger homes and consolidated retail malls in outer ring suburbs.

In the late 20th century the City of Alexandria and Arlington County addressed this disinvestment by pursuing aggressive, innovative redevelopment strategies in key corridors and neighborhoods. Through these efforts the City of Alexandria and Arlington County built the foundation for the strong commercial and economic base that they have today while preserving the unique historical and cultural character of their communities. In the City of Alexandria, efforts to attract reinvestment concentrated on attracting tourists and business to historic Old Town Alexandria. In Arlington County, revitalization efforts focused on maximizing the impact of the introduction of the heavy-rail subway Metro system beginning in the 1970s, and more recently in the revitalization of the historic Shirlington neighborhood. Today the City of Alexandria and Arlington County remain focused on addressing the needs of all residents and businesses in neighborhoods.

This section will provide an overview of the diverse commercial centers and corridors of Alexandria and Arlington. The Alexandria/Arlington region is driven by several leading businesses centers and neighborhood commercial centers, each with its own distinctive economic and cultural identity. Some of the centers are mixed use, regional business and retail destinations, while others are local main street retail and local business corridors. Together these neighborhoods form the backbone of regional economy. Each jurisdiction also contains small, but key, industrial corridors.

Rosslyn-Ballston Corridor (Arlington County)

The Rosslyn-Ballston Corridor (R-B Corridor) is an east-west corridor defined today by intense, mixed-use development concentrated around five Metro stations (Rosslyn, Courthouse, Clarendon, Virginia Square and Ballston) located underground along the corridor's two major thoroughfares, Wilson Boulevard and Clarendon Boulevard (Figure 1.1.1).

The R-B corridor is recognized nationally as a best practice example for transit oriented development. In 1970, prior to the introduction of the Metro, the R-B corridor was home to 22,000 jobs, 5.5 million square feet of office and 7,000 housing units. By 2008 the R-B corridor had 90,000 jobs, 20.8 million square feet of office and 26,572 housing units. The R-B corridor is the economic backbone of Arlington County. In 2002 Arlington County received the Environmental Protection Agency's National Award for Smart Growth Achievement in the Overall Excellence in Smart Growth category for its Rosslyn-Ballston Corridor redevelopment. In 2008 the American Planning Association (APA), designated Wilson & Clarendon Boulevards as "Great Streets" through its *Great Places in America* program. APA Great Places exemplify exceptional character and are places of lasting value.

Table 1.1.1 R-B Corridor Socio-Economic and Demographic Overview

Land Area	1.99 miles
Population	44,097
Median Household Income	\$90,009
Median Value – Owner Occupied Housing	\$371,360
Renter Housing Units	63.7%
Hispanic Ethnicity, of any race	12.4%
Non-White Residents	24.3%
Under Age 20	10.3%

Data Source: ESRI Business Analyst



Figure. 1.1.1 Aerial Photo of the R-B Corridor, Arlington County

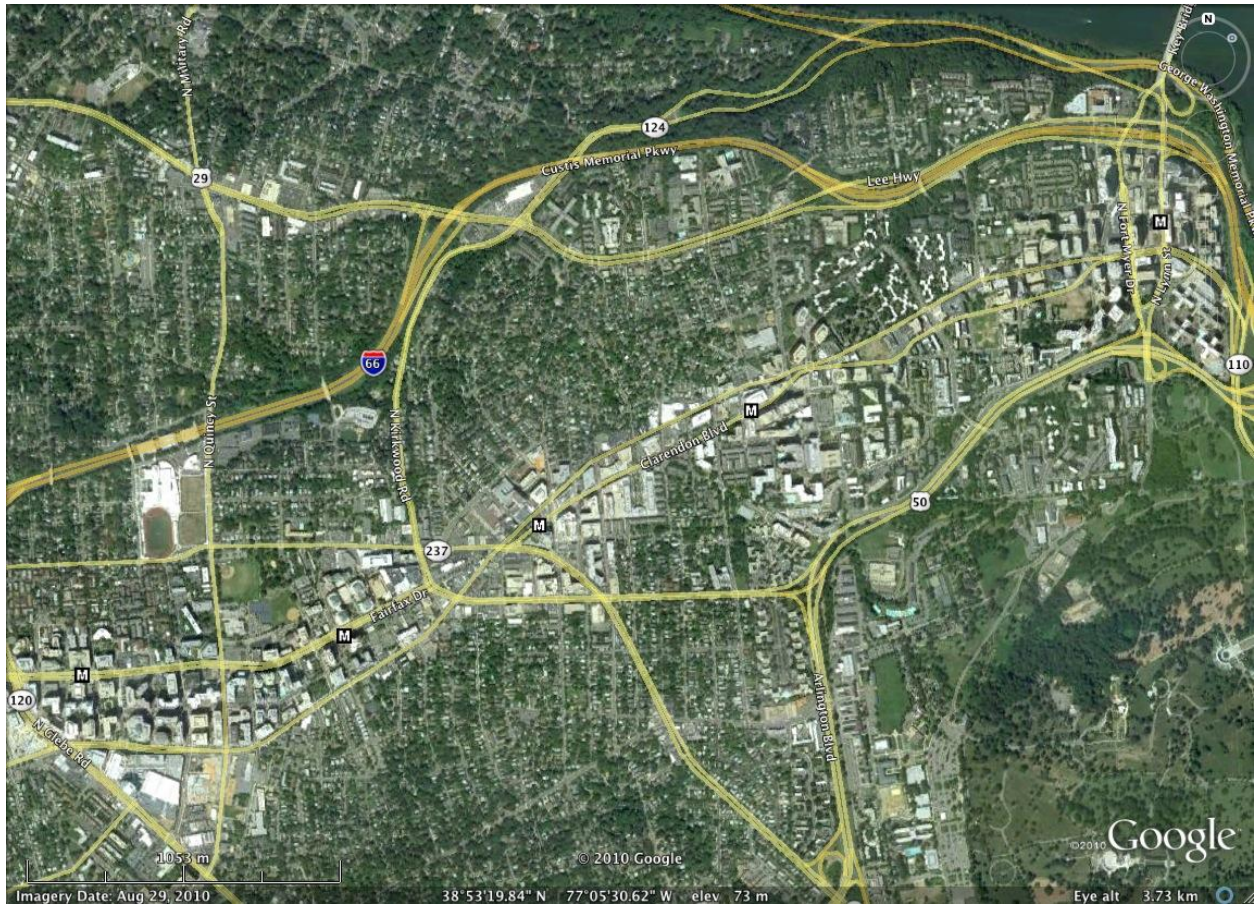


Photo Source: Google Earth

High-density residential and commercial development is located throughout the corridor, but each neighborhood in the corridor has a unique character.

Rosslyn: Rosslyn, the original business center in Arlington, is the eastern anchor of the Rosslyn-Ballston Metro corridor and Washington's gateway to Arlington. It has more than 8 million square feet of office space, over 6,600 households, 2,100 hotel rooms, several urban parks and many diverse restaurants.

Courthouse: Long the center of official Arlington as well as a high-technology hub, Courthouse is a community where business, government, residential and retail combine to create one of Arlington's most dynamic locations.

Clarendon: Located in the heart of the Rosslyn-Ballston Metro corridor, Clarendon is both the center of Arlington's historic retail core and its current nightlife and dining scene center.

Virginia Square: The Virginia Square area is Arlington's educational and cultural center, home to the Arlington campuses of George Mason University and The George Washington University, the state-of-the-art Arlington Central Library and the Arlington Arts Center. It is expected that much of George Mason's growth over the next 10 years will take place at its Arlington graduate and law school campus.

Ballston: Ballston, the western anchor of the Rosslyn-Ballston Metro corridor, is Arlington's hub of science and technology and contains the nation's greatest concentration of scientific research agencies, anchored by the National Science Foundation and the Defense Advanced Projects Research Agency (DARPA). In 2011, the Virginia Tech Research Center, a 132.827 square foot facility was completed. The building houses the [Center for Community Security and Resilience](#), a joint initiative of Arlington County, Virginia Tech and IBM.

Figure 1.1.2 Arlington's R-B Corridor, Development from Ballston to Rosslyn

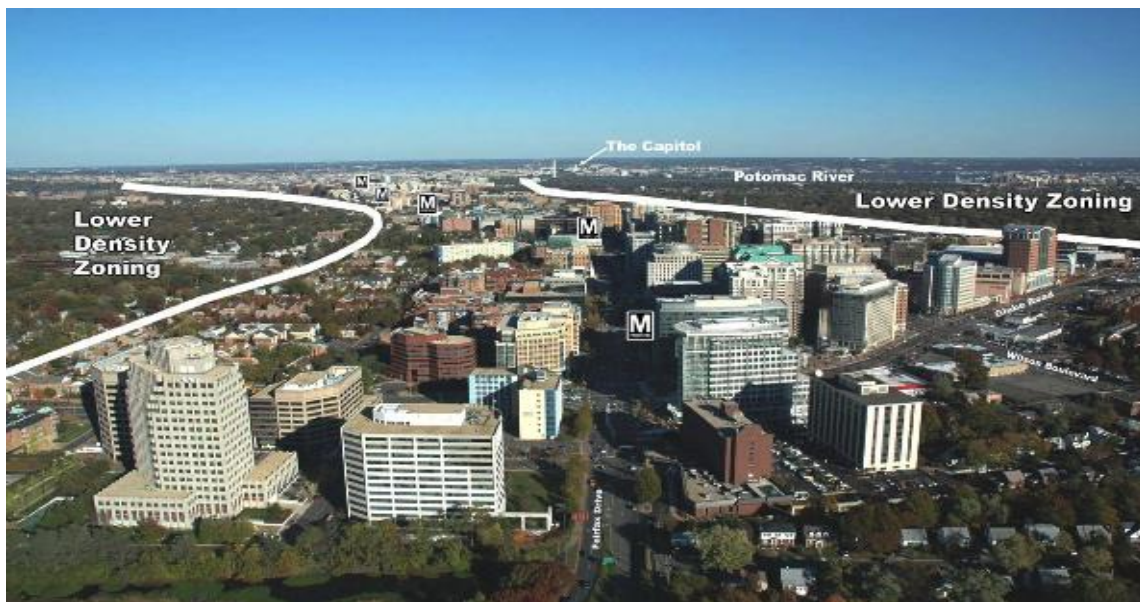


Photo Source: 30 Years of Smart Growth Arlington County's Experience with Transit Oriented Development in the Rosslyn-Ballston Metro Corridor, A Presentation by the Arlington County Department of Community Planning, Housing and Development, Planning Division

Jefferson Davis Corridor (Arlington County)

The Jefferson Davis Corridor is bounded to the west by US Route 1, the Jefferson Davis Highway, and defined by the presence of development concentrated at the Pentagon City and Crystal City metro stations. The Pentagon, located just to the north of Pentagon City, is the world's largest office building by floor area and is the headquarters for the Department of Defense housing 23,000 employees. Pentagon City is anchored by the Fashion Centre at Pentagon City, one of the nation's top indoor malls and a vibrant mixed use community of residential, office and commercial development. Pentagon Row, Pentagon City's newest addition located next to the Fashion Centre, includes 300,000 square feet of retail and 502 residential units. In total 3,400 residential units and 665 luxury hotel rooms are located in Pentagon City.

Table 1.1.2 J-D Corridor Socio-Economic and Demographic Overview

Land Area	1.58 miles
Population	20,365
Median Household Income	\$85,481
Median Value – Owner Occupied Housing	\$438,252
Renter Housing Units	64.5%
Hispanic Ethnicity, of any race	6.4%
Non-White Residents	25.0%
Under Age 20	9.1%

Data Source: ESRI Business Analyst

Crystal City, Arlington's largest downtown, is currently undergoing a transformation. Already an award-winning, mixed-use development with stunning views of the Washington monuments, Crystal City and Pentagon City have more than 4,600 hotel rooms and 170,000 square feet of meeting space, as much office space as many medium-sized cities (17,400,800 square feet), plus access to the heart of the U.S. defense industry, the Pentagon. Crystal City features an abundance of fine restaurants, cafes, specialty stores, outdoor movie nights, and bike trails. The Crystal City Sector Plan, approved in 2010, envisions the area as an even livelier, complete, urban community with enhanced transit options, streets and public space.



Columbia Pike (Arlington County)

Columbia Pike, one of region's most diverse communities both in terms of residents and development, is a center for the region's immigrant community. The Columbia Pike neighborhood is defined by Columbia Pike, an aging auto-oriented commercial and low-to-medium density residential corridor. Since the Second World War, Columbia Pike functioned as a traditional main street for the South Arlington neighborhood.

As detailed in the table below, Columbia Pike has a larger household size, a larger proportion of residents under 20 years of age, a lower median income and a much larger Hispanic and Non-White population than other areas of the County. In 2002 Arlington County established the Columbia Pike Initiative to guide revitalization efforts in the community to enhance both the physical space and the economic well-being of its residents. The vision for revitalization of the corridor is to return it to a main street corridor with a fully-functional, pedestrian friendly streetscape and new commercial and residential development. In addition to a revitalization plan for Columbia Pike, approved in 2002, the Initiative oversaw the adoption of a form based code plan in 2003, a plan for streetscape improvements in 2004, and an updated revitalization plan in 2005. An important element of the success of the Columbia Pike revitalization is the introduction of improved mass transit options. There are plans for a Columbia Pike Streetcar with a route that would travel from the Pentagon along Columbia Pike to the Skyline area in Fairfax County, and possibly to the Northern Virginia Community College's Alexandria Campus and the Mark Center development, both in the City of Alexandria.

Table 1.1.3 Columbia Pike Socio-Economic and Demographic Overview

Land Area	1.09 miles
Population	26,176
Median Household Income	\$58,173
Median Value – Owner Occupied Housing	\$231,875
Renter Housing Units	66.7%
Hispanic Ethnicity, of any race	34.2%
Non-White Residents	49.4%
Under Age 20	24.6%

Data Source: ESRI Business Analyst



Shirlington (Arlington County)

A compact, mixed-use community located just to the west of Interstate-395 in South Arlington, Shirlington is the most recent award-winning example of Arlington's ability to successfully redevelop neighborhoods, increasing their economic value while providing enhanced quality of life and economic opportunities for residents. Once an aging, traditional big box suburban shopping center with copious amounts of parking, Shirlington is now known as the arts and entertainment capital of Arlington, with its established café culture, live theater and pedestrian promenade. The redevelopment of Shirlington Village was accomplished through a creative public-private partnership between Arlington County and the property owner, Federal Realty Investment Trust, as well as through community involvement. The Village at Shirlington includes a new state-of-the art landmark theater-library complex, five new residential buildings with 644 units, a 142 room hotel, 42,000 square feet of retail space, a 195,000 square foot office building, two parking garages with nearly 1,500 spaces, and an urban transit station.

Table 1.1.4 Shirlington Socio-Economic and Demographic Overview

Land Area	0.38 miles
Population	3,884
Median Household Income	\$81,387
Median Value – Owner Occupied Housing	\$243,156
Renter Housing Units	64.9%
Hispanic Ethnicity, of any race	16.8%
Non-White Residents	29.6%
Under Age 20	11.5%

Data Source: ESRI Business Analyst



Arlandria (City of Alexandria)

Arlandria is a triangular shaped neighborhood in northeast Alexandria that borders Arlington County. Arlandria is defined by Four Mile Run to its north, Route 1 (Jefferson Davis Highway) to its East, and West Glebe Road to the southwest. The name Arlandria is a combination of Alexandria and Arlington, reflecting the neighborhood's link to both jurisdictions. Like Columbia Pike and other parts of South Arlington, Arlandria is home to a large Hispanic immigrant community, and has a higher than average proportion of renter households and youth residents under the age of 20, as well as lower median household incomes. The issues of aging commercial developments and auto-oriented uses facing South Arlington neighborhoods such as Columbia Pike are also present in Arlandria. In 2000, the City of Alexandria began a planning process with the residents of Arlandria to address the physical condition of their community and plan for increased retail and economic development in the neighborhood. In 2003, the City of Alexandria produced a Long-Term Vision and Action Plan for the Arlandria Neighborhoodⁱ that envisions the neighborhood as a pedestrian friendly environment with a "healthy" level of mixed use and enhanced local and destination retail options. This collaborative planning process continues today.

Arlandria is home to the only Enterprise Zone in Northern Virginia, created by the Virginia General Assembly in 1982. The Enterprise Zone designation provides local businesses located with access to a unique set of state and local incentives and is designed to facilitate the growth of local businesses in economically depressed areas.

Table 1.1.5 Arlandria Socio-Economic and Demographic Overview

Land Area	0.47 miles
Population	11,410
Median Household Income	\$57,368
Median Value – Owner Occupied Housing	\$211,875
Renter Housing Units	78.7%
Hispanic Ethnicity, of any race	56.0%
Non-White Residents	72.8%
Under Age 20	30.0%

Data Source: ESRI Business Analyst



Greater Old Town/Waterfront (City of Alexandria)

In this plan, the Greater Old Town/Waterfront area encompasses the historic core of Alexandria, the King Street and Waterfront retail and business centers, and the area commonly referred to as “North Old Town” that is predominately residential to its north. The Greater Old Town area is the economic center of Alexandria, with many national organizations and notable firms having their headquarters within the area. The City of Alexandria is currently in the process of creating an update to its Waterfront Small Area Plan.ⁱⁱ

Table 1.1.6 Greater Old Town/Waterfront Socio-Economic and Demographic Overview

Land Area	1.90 miles
Population	21,243
Median Household Income	\$92,986
Median Value – Owner Occupied Housing	\$491,892
Renter Housing Units	45.1%
Hispanic Ethnicity, of any race	5.3%
Non-White Residents	29.8%
Under Age 20	14.7%

Data Source: ESRI Business Analyst



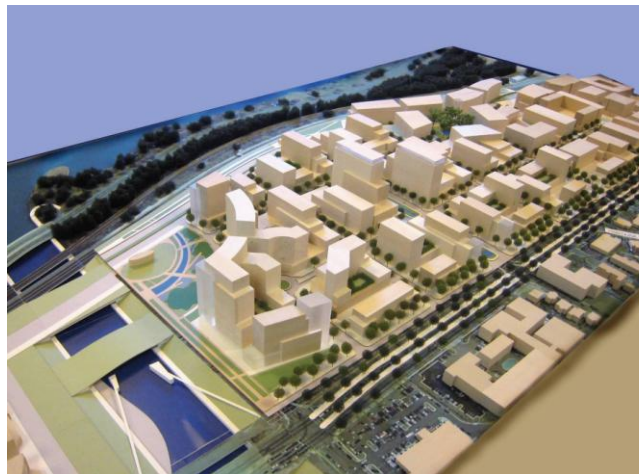
North Potomac Yard (City of Alexandria)

The Potomac Yard, formerly a railroad switching yard located along the Jefferson Davis Highway in the City of Alexandria, just south of Arlington's J-D corridor, is today characterized by a large suburban style big box retail shopping center. A Small Area Plan for the redevelopment of North Potomac Yard was adopted by Alexandria's City Council in June 2010.ⁱⁱⁱ The approved plan's vision for the space is "an environmentally and economically sustainable and diverse 21st Century urban, transit-oriented, mixed-use community that is compatible with adjacent neighborhoods. The Plan seeks to create a regional destination with diverse built and natural spaces where people want to spend time in a wide variety of pursuits." There are also plans for a new Metro Station to provide rail access to the development.

Table 1.1.7 North Potomac Yard Socio-Economic and Demographic Overview

Land Area	0.39 miles
Population	583
Median Household Income	\$100,000
Median Value – Owner Occupied Housing	\$391,346
Renter Housing Units	42.2%
Hispanic Ethnicity, of any race	4.1%
Non-White Residents	7.7%
Under Age 20	5.3%

Data Source: ESRI Business Analyst



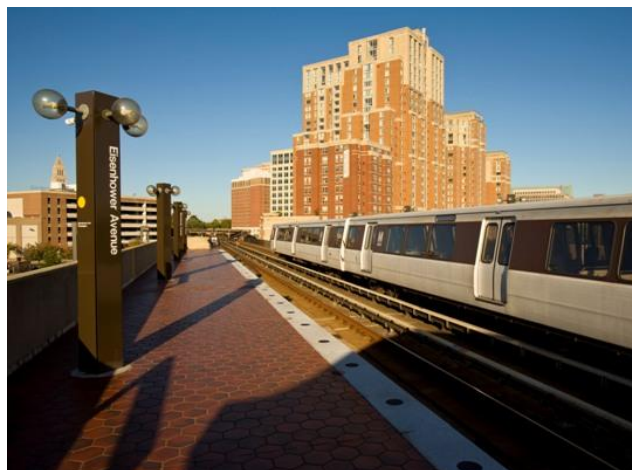
Eisenhower Valley (City of Alexandria)

The Eisenhower Valley is an east-west corridor along Eisenhower Avenue that parallels the City of Alexandria's southern border along Cameron Run and is home to a range of recreational facilities, restaurants, city services and entertainment options. The Eisenhower Valley currently includes nearly 7.0 million square feet of office space, 2.1 million square feet of other commercial space, and more than 400 businesses employing more than 25,000 employees. Much of the commercial development in the Eisenhower Valley is concentrated in the corridor's eastern area, which is adjacent to the Greater Old Town neighborhood, and is commonly known as the Carlyle submarket. The west end of the Eisenhower Valley ("Eisenhower West") is populated largely with industrial uses, including four heavy industrial sites and other light industrial uses such as warehouse space, production, distribution and repair operations. Among the industrial and commercial uses dominant in the Eisenhower Valley are residential areas.^{iv}

Table 1.1.8 Eisenhower Valley Socio-Economic and Demographic Overview

Land Area	2.00 miles
Population	16,165
Median Household Income	\$75,465
Median Value – Owner Occupied Housing	\$289,450
Renter Housing Units	55.0%
Hispanic Ethnicity, of any race	15.0%
Non-White Residents	39.8%
Under Age 20	18.5%

Data Source: ESRI Business Analyst



Beauregard/Seminary (City of Alexandria)

The Beauregard/Seminary area is centered at the intersection of North Beauregard Street and Seminary Road and bound to the east by Interstate 395 and by low-density residential neighborhoods to the west. The area to the north of Seminary Road includes several older high-rise apartments set apart among multiple garden apartment developments. To the south of it is Mark Center which will encompass all of the new office development and employment that will be added to the City of Alexandria as a result of the Base Realignment and Closure 133 decision. This area today is dominated by auto-oriented uses, although many of the area's residents use the bus as their primary mode of transportation. As shown in the table below, the current residents of the Beauregard/Seminary area are less wealthy and more likely to be renters and of an ethnic or racial minority than residents of the City of Alexandria as a whole. The Alexandria Campus of the Northern Virginia Community College is located just to the north of the Beauregard/Seminary community.

Table 1.1.9 Beauregard/Seminary Socio-Economic and Demographic Overview

Land Area	0.58 miles
Population	8,225
Median Household Income	\$56,010
Median Value – Owner Occupied Housing	\$345,833
Renter Housing Units	86.7%
Hispanic Ethnicity, of any race	14.0%
Non-White Residents	50.7%
Under Age 20	17.9%

Data Source: ESRI Business Analyst



1.2 Demographic Profile

Steady growth in population and employment in the Alexandria/Arlington region is projected for the next 20 years (Figure 1.2.1). While the region currently has more residents than jobs, by 2020 the number of jobs will outnumber the number of residents. Population is projected to increase by 20 percent and employment by 38 percent between 2010 and 2030.

The age distribution of Alexandria/Arlington residents is expected to change little between 2010 and 2030. Currently, around 20 percent of Alexandria/Arlington residents are under the age of 20, 75 percent are between the ages of 20 and 64, and 10 percent are 65 years old and older. Figure 1.2.2 compares the projected age distribution of Alexandria/Arlington residents with Virginia residents for the year 2030.

Over the next 20 years it is forecasted that the Commonwealth of Virginia's proportion of residents over 65 years old and older will grow from 12 percent to 19 percent, while the proportion of working age adults, particularly those ages 45-64 will drop. By 2030 adults in the prime working ages of 25 to 64 will account for just 49 percent of the state's population. This aging trend will be present but less pronounced in Alexandria and Arlington; adults between the ages of 25 to 64 will comprise 63 percent of the region's 2030 population.

The region will no doubt benefit from the higher proportion of working age adults vis-à-vis the state and the projected employment growth, but these factors will also create unique challenges. With more employees than residents, Alexandria and Arlington will continue to face workforce housing challenges (Section 2.3), and its already overburdened transportation system will face additional pressures (Section 1.6). These factors could provide a disincentive for employers to locate in the region and constrain future economic growth.

The Alexandria/Arlington region is highly diverse, exhibiting a demographic profile that differs from that of the rest of Virginia. The region is more diverse than the rest of the state as a whole, (currently 68 percent of state residents are non-Hispanic Whites, 58 percent of Alexandria/Arlington residents are non-Hispanic Whites), and it will remain more diverse than the state for the next 20 years (Figure 1.2.3). The proportion of the population comprised of non-Hispanic African Americans will remain essentially constant over the next twenty years, at both the state level and in the Alexandria/Arlington region. Unlike other parts of Virginia where African Americans are the largest minority, Latinos are the largest minority in Alexandria and Arlington and are projected to maintain this status through 2030.

Figure 1.2.1 Alexandria/Arlington Employment, Population, and Households Projections, 2010-2030¹

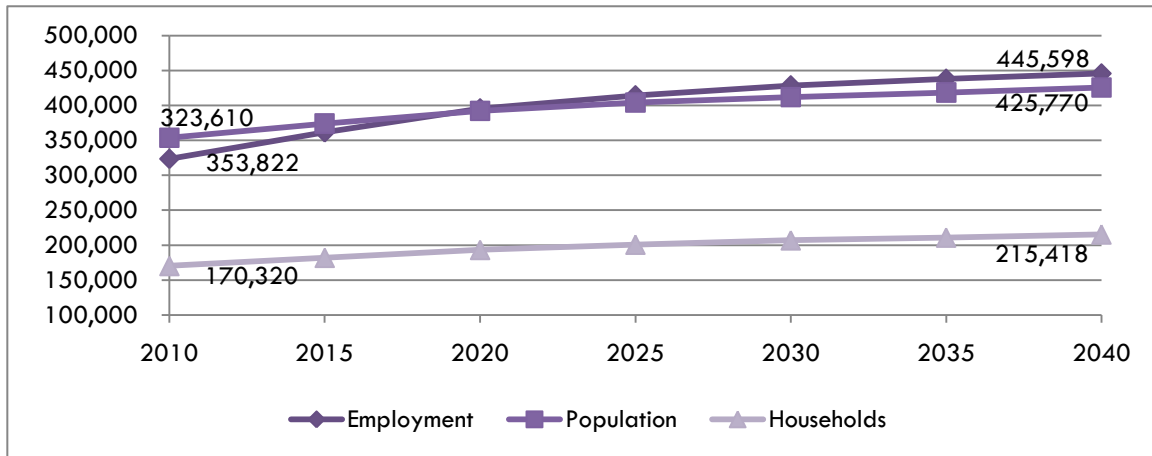


Figure 1.2.2 Projected 2030 Population Age Distribution, Alexandria/Arlington and Virginia²

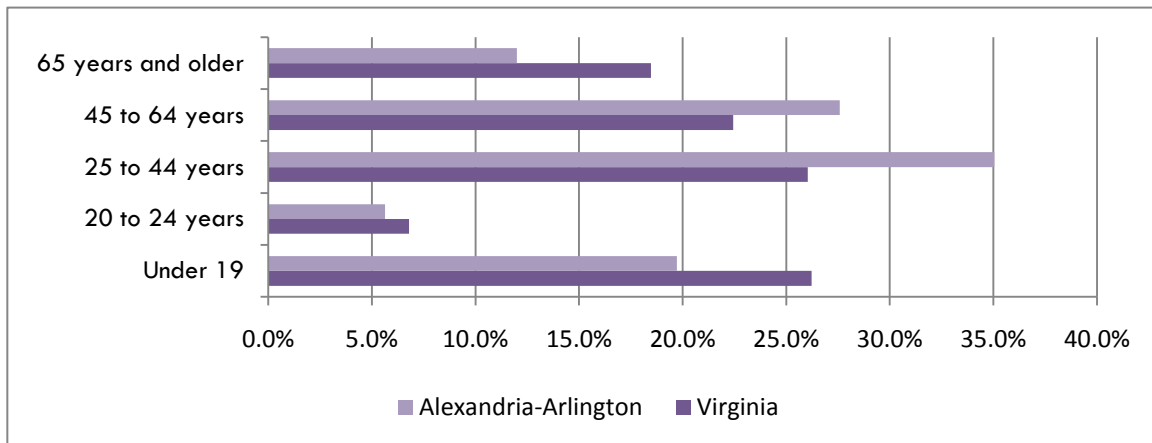
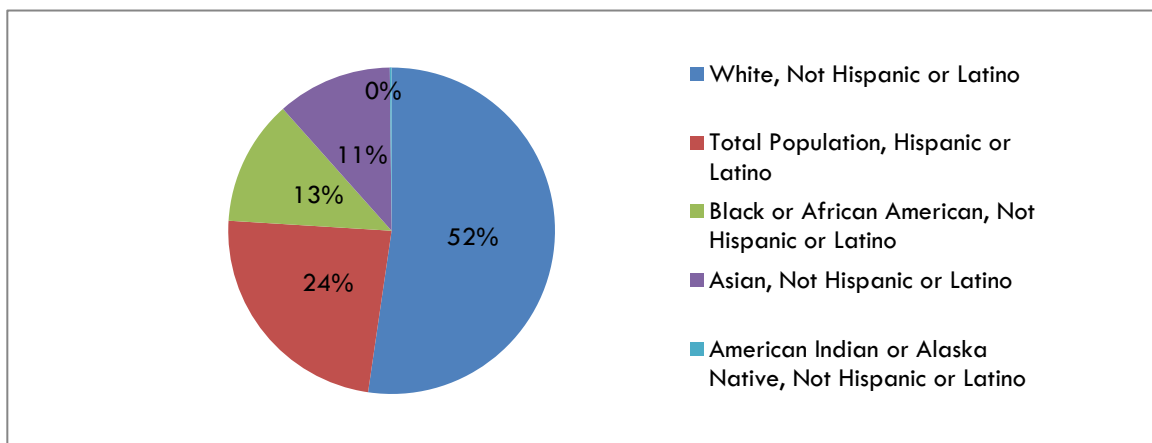


Figure 1.2.3 Alexandria/Arlington Resident Population by Race, 2030 (Projection)³



¹ Data Source: Metropolitan Washington Council of Governments, Round 7.2 Cooperative Forecasts

² Data Source: Virginia Employment Commission

³ Data Source: Virginia Employment Commission

1.3 Socio-Economic Profile

The City of Alexandria and Arlington County benefit from having a population that is very highly educated vis-à-vis the state and the country. In fact, our region regularly ranks at or near the top in national assessments of educational attainment. Sixty-five percent of adult Alexandria/Arlington residents have at least a Bachelor's degree, compared with 33 percent of Virginia residents and 27 percent of United States citizens (Figure 1.3.1). These higher levels of education translate directly into higher per capita personal income (Figure 1.3.2) levels and higher levels of earnings per job (Figure 1.3.3) in Alexandria and Arlington than in the state.

Although there is an income and earnings gap between Virginia and the Alexandria/Arlington region, it has not significantly grown in recent years. In the decade between 1999 and 2008 per capita personal income in current dollars increased by 56 percent in Alexandria, 55 percent in Arlington and 49 percent in the Commonwealth of Virginia. In this period average earnings per job in current dollars increased by an average of five percent annually in Alexandria, and four percent annually in Virginia and Arlington.

However, while many Alexandria/Arlington residents enjoy high-paying job opportunities, some communities within the region are less economically secure. Many local neighborhoods in the Alexandria/Arlington region have been magnets for domestic and international immigrants, and these residents may face significant employment challenges. According to Census 2000 data, 24 percent of Alexandria and Arlington residents are foreign born, but only 10 percent of Virginia residents and 13 percent of Americans are foreign born. English is not the only language spoken at home in 29 percent of Alexandria homes and 30 percent of Arlington homes.

Table 1.3.1 Educational Attainment, Alexandria/Arlington, Virginia and the United States⁴

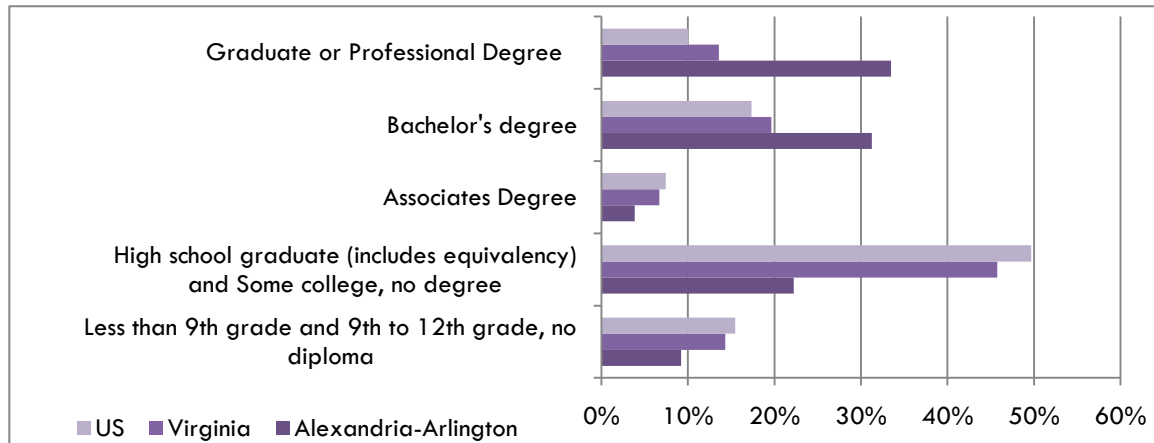


Table 1.3.2 Per capita personal income, Alexandria, Arlington and Virginia, 1999-2008⁵

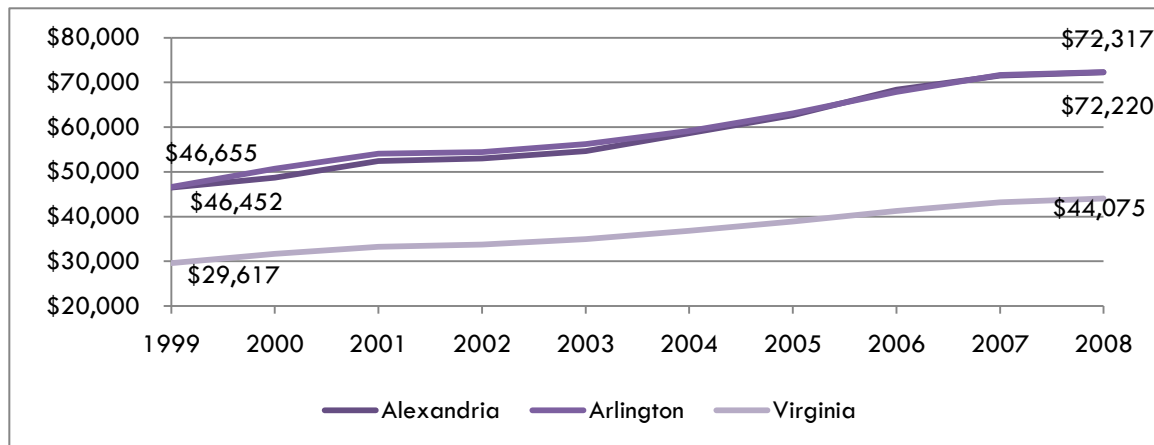
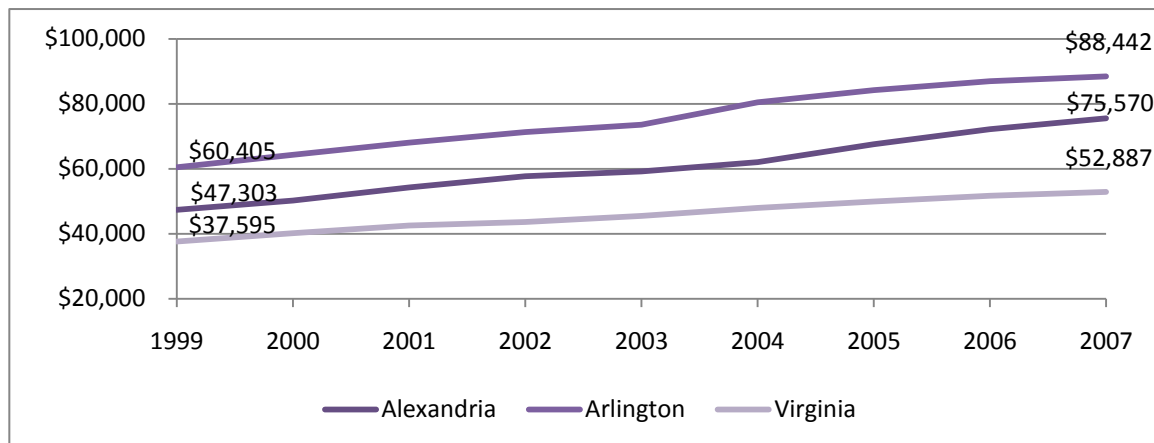


Table 1.3.3 Average earnings by job (dollar), Alexandria, Arlington and Virginia, 1999-2008⁶



⁴ Data Source: U.S. Census Bureau, American Community Survey, 2006-2008 American Community Survey 3-Year Estimates

⁵ Data Source: U.S. Dept. of Commerce, Bureau of Economic Analysis

⁶ Data Source: U.S. Dept. of Commerce, Bureau of Economic Analysis.

Student Achievement

Students in Arlington Public Schools (APS) come from 127 countries and speak 105 different languages. In Alexandria City Public Schools (ACPS) they come from 128 countries and speak 75 different languages. Both school systems are majority minority, where ethnic or racial minorities comprise the majority of students, with white comprising 25 percent of ACPS students and 48 percent of APS students. This great diversity of students is representative of the diversity of the region and the continual influx of new residents from all backgrounds and socio-economic classes.

However, despite the overall economic well being of the region and the paramount value and significant investment in the schools, challenges remain in facilitating student achievement and workforce readiness at the K-12 level. One of the most highly concerning of these challenges is overcoming the persistent student achievement gap between white and minority students. The minority achievement gap is a national trend not unique to the Alexandria/Arlington region, and one that has an important link to workforce development and socio-economic mobility. APS Office of Minority Achievement has a number of dedicated programs and sponsors college tours for minority high school students each year.^v In 2008, ACPS was accepted into the Minority Student Achievement Network, a national coalition of multiracial, suburban-urban school districts that collaboratively study achievement gaps and how to close them.^{vi}

Despite these concerted efforts, a minority achievement gap remains in both school systems. In Arlington Public Schools the 2010 the achievement gap in passing reading tests between white and black students was 17 points, between white and Hispanic students it was 16 points. The 2010 APS mathematics test pass rate gap between white and black students was 16 points, between white and Hispanic students it was 20 points.^{vii} In Alexandria City Public Schools the 2010 the achievement gap in passing reading tests between white and black students was 14 points, between white and Hispanic students it was 17 points. The 2010 ACPS mathematics test pass rate gap between white and black students was 19 points, between white and Hispanic students it was 20 points.^{viii}

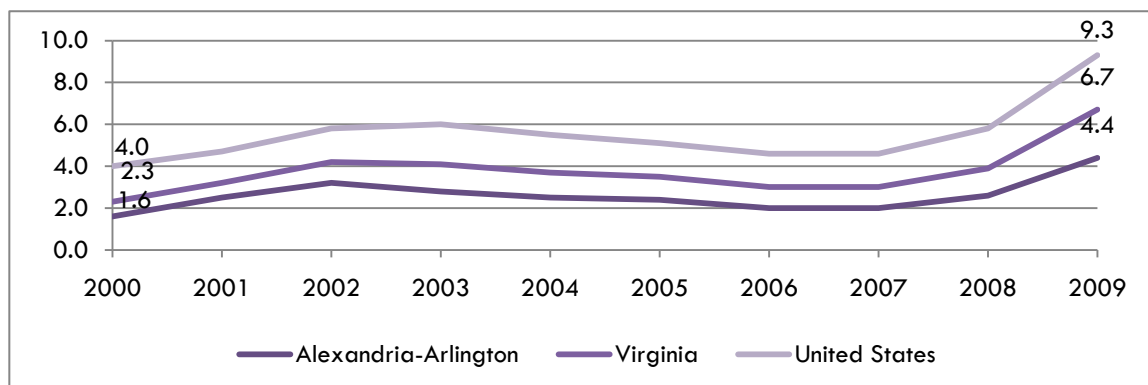
1.4 Labor Force Profile

Annual unemployment rates in the City of Alexandria and Arlington County have remained lower than the national benchmarks since 2000, but they mirrored national and state trends. Like other parts of the US, unemployment rates jumped during the recent downturn. However, regional unemployment rates remain lower than state or national averages. (Figure 1.4.1).

The characteristics of the insured unemployed in Alexandria and Arlington differ in several significant ways from the insured unemployed in the Commonwealth of Virginia. Hispanics comprise a much larger percentage of the insured unemployed in the Alexandria/Arlington region, and Whites a much smaller percentage compared with the state (Figure 1.4.2). The insured unemployed in Alexandria and Arlington are also much more likely to have either completed at least a Bachelor's degree, or have less than an 8th grade education (Figure 1.4.3). Clients of the region's One-Stop Employment Centers, Alexandria JobLink and Arlington Employment Center, reflect this dichotomy of educational attainment in the region, as close to a fifth of the Center's clients do not have a high school education, but 45 percent have completed some college (Figure 1.4.4).

Overall, labor force participation by individuals ages 16 and older is higher in Alexandria (76 percent) and Arlington (78 percent), than in Virginia (68 percent) or the nation (65 percent) according to Census data. Historically, many of the region's least economically secure residents have held more than one job. Among adults participating in Arlington County's Education & Employment Program (REEP) adult English classes, 15 percent held more than one job in 2007, but in 2009 just 3 percent held more than one job. The adults participating in these classes earn an average of just \$334 a week, a value that declined 24 percent between 2007 and 2009. Unemployment among REEP students increased from 18 percent in 2007 to 29 percent in 2009. The most common areas of employment among REEP students include restaurants, construction, childcare, and housekeeping/maintenance.^{ix}

Figure 1.4.1 Unemployment Rates, Alexandria/Arlington, Virginia and the United States, 2000-2009⁷



⁷ Data Source: U.S. Dept. of Labor, Bureau of Labor Statistics

Figure 1.4.2 Characteristics of the Insured Unemployed – Ethnicity⁸

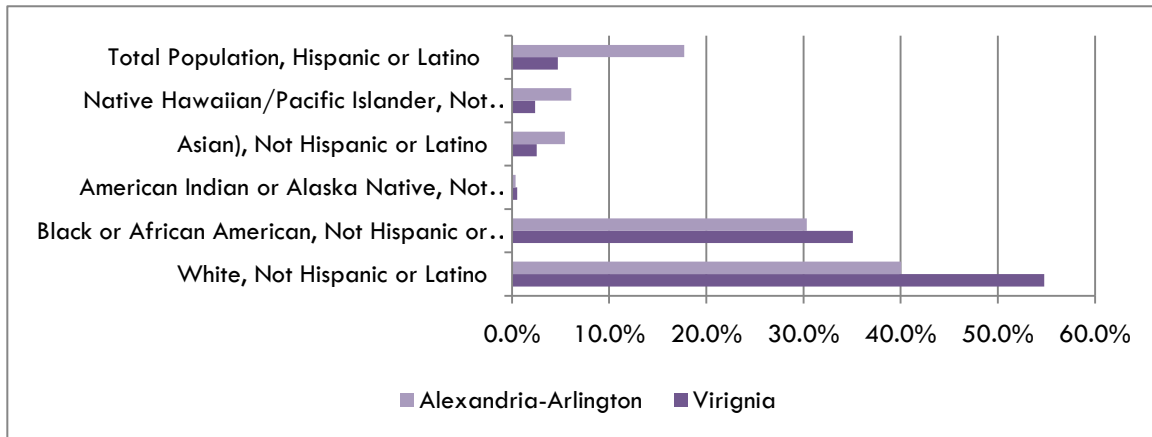


Figure 1.4.3 Characteristics of the Insured Unemployed, Level of Education⁹

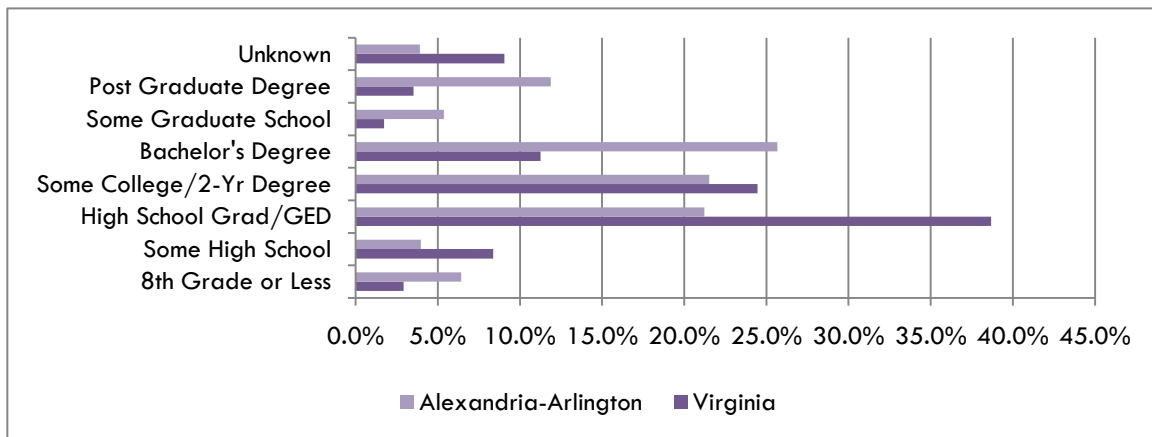
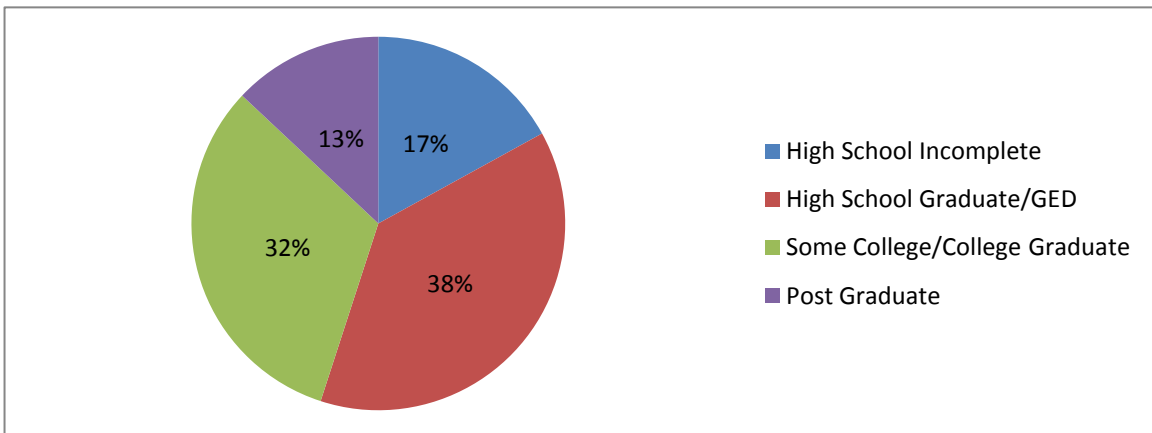


Figure 1.4.4 Employment Center Clients by Level of Education¹⁰



⁸ Data Source: Virginia Employment Commission

⁹ Data Source: Virginia Employment Commission

¹⁰ Data Source: Alexandria JobLink & Arlington Employment Center, 2008-2009 Survey Data

1.5 Major Industry Clusters

The Alexandria/Arlington employment base has grown in the first decade of the 21st century, but not across all industry clusters in the economy (Figure 1.5.1). Employment in the key information and management of companies and enterprises cluster, declined an average of 4 and 3 percent per year respectively during the 2001-2008 period. Employment in the region's largest industry cluster, government employment, has remained flat for well over a decade. The arts, entertainment, and recreation and the educational services clusters both experienced real and notable employment growth in the region. Two industry clusters, government and government enterprises and professional, scientific, and technical services, dominate employment in the Alexandria/Arlington region. These clusters together comprise 46 percent of all employment and form the backbone of the region's economy.

Government and Government Enterprises

Regional government employment grew by 6 percent between 2001 and 2008, but this growth did not occur steadily over time or by level of government. Over this period federal civilian employment in Arlington declined by 3 percent and military employment by 14 percent, while military employment remained essentially flat in the City of Alexandria. Federal employment in Alexandria did not grow between 2001 and 2004, but doubled between 2004 and 2008 due to the relocation of the U.S. Patent and Trademark Office and its 6,500 employees from Arlington to Alexandria beginning in 2004. Between 2001 and 2008 the federal government created over 2,300 net new jobs, principally in the period of 2001-2004 when the federal government mobilized resources to respond to post 9/11 security concerns. State and local government, which account for a quarter of government employment in the region, created just over 1,000 net new jobs in Alexandria and Arlington between 2001 and 2008. The risks associated with the significant role of the federal government in the region are discussed in detail in Section 2.2: Economic Diversification and the Dependence on the Federal Government.

Professional, Scientific and Technical Services

In the Alexandria/Arlington region two important subsectors – Advanced Technology and Organizations – define the professional and technical services cluster. A 2004 Arlington Economic Development report found that Arlington County alone had 26,000 workers employed in 1,200 firms in the Advanced Technology, or high tech industry cluster.^x Arlington County's high tech industry cluster is focused on the service sector in activities including consulting, computer systems design, human resources consulting, R&D in social science and humanities, engineering services, custom computer programming, environmental consulting, and other scientific and technical consulting services. Several major federal R&D agencies are located in Arlington, including the National Science Foundation, the Department of Defense Office of Naval Research, Air Force Office of Scientific Research and the Defense Advanced Research Projects Agency.

Alexandria has the fourth largest concentration of trade and professional organizations in the country, complimented by headquarters of other nonprofit organizations. Four of the five largest charities in the country are also headquartered in Alexandria; the United

Way, Catholic Charities USA, the Salvation Army and Gifts in Kind. Together with Arlington, the two jurisdictions are home to nearly 700 non-profit membership organizations that employ more than 14,000 according to Bureau of Labor Statistics data.

Educational Institutions

The City of Alexandria and Arlington County are home to a diverse group of higher education institutions, including law schools, graduate schools, university research centers, undergraduate programs and community college and technical training programs. Among these programs are:

- George Mason University (GMU) School of Public Policy and Law School (Arlington): The law school is located in the Rosslyn-Ballston corridor in a new, 150,000 square foot facility. The GMU Law School was established in 1979, and is today nationally recognized for its intellectual property curriculum. Entrance into the GMU Law School is selective, with just 247 students entering in Fall 2009 out of an applicant pool of more than 5,000. The School of Public Policy offers Master's and Doctoral degrees in public policy, health and medical policy, international commerce and policy, organizational development, transportation, and peace operations.
- Marymount University (Arlington): Marymount is an independent Catholic university that provides Bachelor's, Master's and Doctoral degrees in a number of disciplines and has a student body of approximately 3,600.
- A number of extensions of universities located outside of Arlington and Alexandria are focused on graduate instruction, often geared towards working professionals. Among the largest of these institutions are: Georgetown University (Arlington), Virginia Tech National Capital Region (Alexandria and Arlington) and the George Washington University Graduate Education Center (Alexandria and Arlington). A number of other institutions such as the Institute for the Psychological Sciences (Arlington), a graduate school that offers degrees in clinical and general psychology, Florida Institute of Technology (Alexandria), DeVry University (Arlington) and Strayer University (Alexandria and Arlington), among others.

The Northern Virginia Community College (Alexandria Campus, Arlington Center): Renowned as one the nation's top community colleges, the system's Alexandria Campus offers a variety of classes and serves 17,000 students pursuing their Associates Degrees, while the Arlington Center offers work-related credit, workforce development and continuing education courses and caters to adults working full-time.

Retail

The City of Alexandria and Arlington County are both known for their destination retail and dining (King Street in the Old Town area of the City, and Clarendon and the Fashion Centre at Pentagon City in Arlington). Although both jurisdictions have enjoyed successes in attracting national retail chains and growing local retail, there remain areas of concern and both jurisdictions recently and independently explored ways to diversify and expand their retail base.

In 2008 Arlington Economic Development established a Retail Task Force to address several areas of concern. The Task Force's report, *Boutiques, Bistros & Banks*, found that Arlington's "retail everywhere" policy of requiring first floor retail be included in virtually all new development resulted in an oversupply of retail space and in retail being built in locations with little foot traffic or unsuitable for retailing.^{xi} Among the report's recommendations was that the County revise its policies for retail to allow for more flexible and adaptable space to be built, and to allow for more creativity in retail signage.

A 2009 report commissioned by the City of Alexandria on the King Street Retail Market, found that Old Town could accommodate 250,000 square feet of additional retail and restaurant space, potentially generating more than \$100 million in additional annual sales revenue.^{xii} The report recommended that the diversification of the types of retail found on King Street could increase visitor spending, which currently amounts to \$584 million annually. The report also recommended that Old Town businesses implement modern merchandizing and business practices and engage in some form of effective group marketing and pursue improvements in parking, lighting and signage to enhance the shopper's experience.

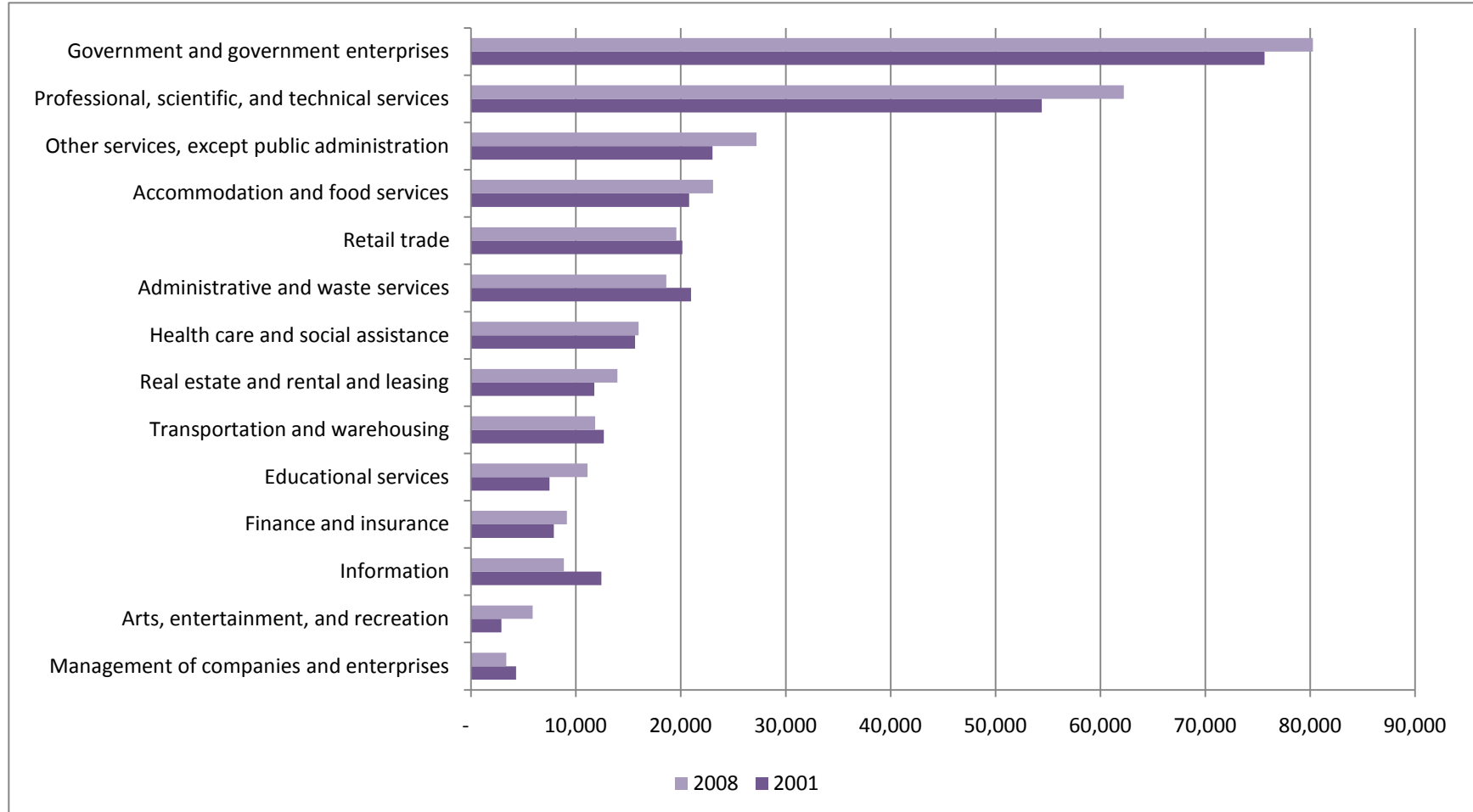
Arts and Creative Industries

The arts, entertainment and recreation cluster grew 102% in the period between 2001 and 2008 – the fastest growth of any industry cluster in the Alexandria/Arlington region during this period. Over the past decade there has been a growing recognition of the critical role of the arts and creative industries in the region's economic development. This recent growth in the arts and creative industry in Alexandria is supported by past investments. In 1969, the City of Alexandria purchased a functionally obsolete World War I era Torpedo Factory located on the City's waterfront at the terminus of King Street. In 1974 this facility reopened as the Torpedo Factory Arts Center, refashioned as work and exhibition space for local artists. The Torpedo Factory Arts Center was a crucial component of the redevelopment of Old Town Alexandria in the thriving retail and tourism destination that it is today. Today more than 160 artists create, exhibit and sell their work at the Torpedo Factory Arts Center; many other arts related classes and activities also take place in the center.^{xiii} The arts industry in Alexandria has continued to grow. In 2008 a new and innovative arts and creative industry service organization, iMAGINE Alexandria, emerged. iMAGINE Alexandria is seeking to construct a 50,000 square foot "creative hub" to assist firms in creative industries at all stages of their development. If constructed, the iMAGINE Alexandria building would include incubator space and even a museum dedicated to all creative industries. iMAGINE Alexandria was created by a small group of creative industry professionals and is already connecting the 250 creative industry firms across Alexandria.^{xiv}

The arts and creative industries are also growing in Arlington. Under the leadership of the Crystal City Business Improvement District (BID), the Crystal City neighborhood in the Jefferson Davis Corridor has made the arts, both public art and the dramatic arts, an integral part of the area's economic development and quality of life strategy. The Arlington Arts Center, a private, nonprofit contemporary visual arts center, hosts artist

exhibitions, educational programs and subsidized studio space for emerging artists. A number of theaters and arts institutions already exist in Arlington, including the Synetic Theater, Signature Theater, and the Artisphere, among many others. In 2007 Arlington Economic Development released a report the agency commissioned, *A Needs Assessment & Business Plan for Arlington County Cultural Arts Facilities*, that evaluated the market for an increased presence of arts and cultural facilities while also examining the availability of affordable facilities that could meet the demand.^{xv} This report found a lack of high-quality professional, stand-alone theaters in the county. It identified a “pressing demand” for a multi-purpose 500-seat theater and a “very high tech black box space seating 150-200 for film, experimental work, theater, dance and some music.”

Figure 1.5.1 Alexandria/Arlington Employment by Select Industry Clusters, 2001-2008¹¹



¹¹ U.S. Dept. of Commerce, Bureau of Economic Analysis

Industry Cluster and Sub-Cluster Growth and Concentration

While the total employment and growth rates for each of the major industry clusters in the region presents an overall representation of industry-level growth and size in the Alexandria/Arlington region, these measures alone do not provide a sense of what clusters are strong, growing or emergent in the region. A further analysis of major industry clusters, as well as selected sub-clusters was required to determine the level of competitive advantage of individual clusters.

Our analysis of strong potential industry clusters is based on a methodology developed by Dr. Heike Mayer.^{xvi} Using her model, we assessed local clusters according to two criteria:

- 1) Industry concentrations, with a focus on those sectors with employment levels that were 40 percent greater (i.e with a location quotient¹² above 1.4) than the national average,
- 2) Industry growth rates between 2001 and 2008.

The results of this analysis, using NAICS codes, are presented below. These data suggest that our region has key strengths in a number of clusters, such as professional, scientific, and technical services, that have enjoyed rapid growth and are projected to continue such growth into the future.

¹² The location quotient measure indicates the percentage greater (or lesser) than the national economy that an industry plays in the regional economy. A location quotient greater than 1.0, the share of an industry's presence in the regional economy is greater than its share in the national economy.

Figure 1.5.2 Selected Industry Sub-Clusters (3-digit NAICS), 2008 Concentration and 2001-2008 Growth

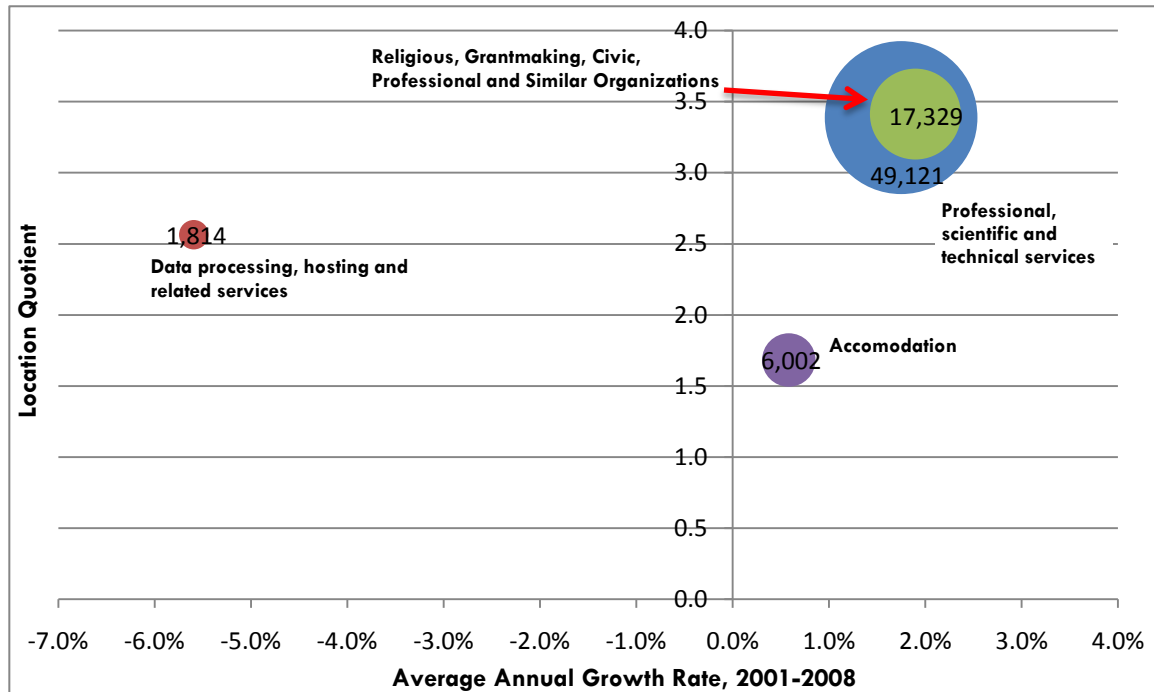


Figure 1.5.3 Selected Industry Sub-Clusters (4-digit NAICS), 2008 Concentration and 2001-2008 Growth

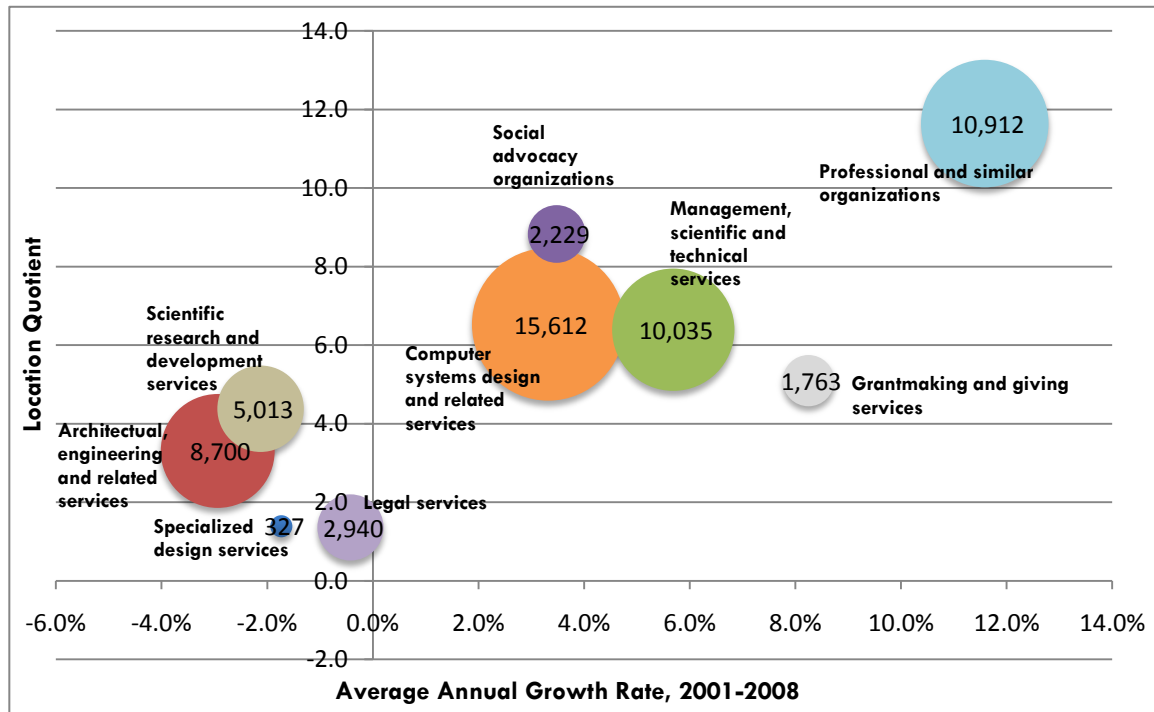
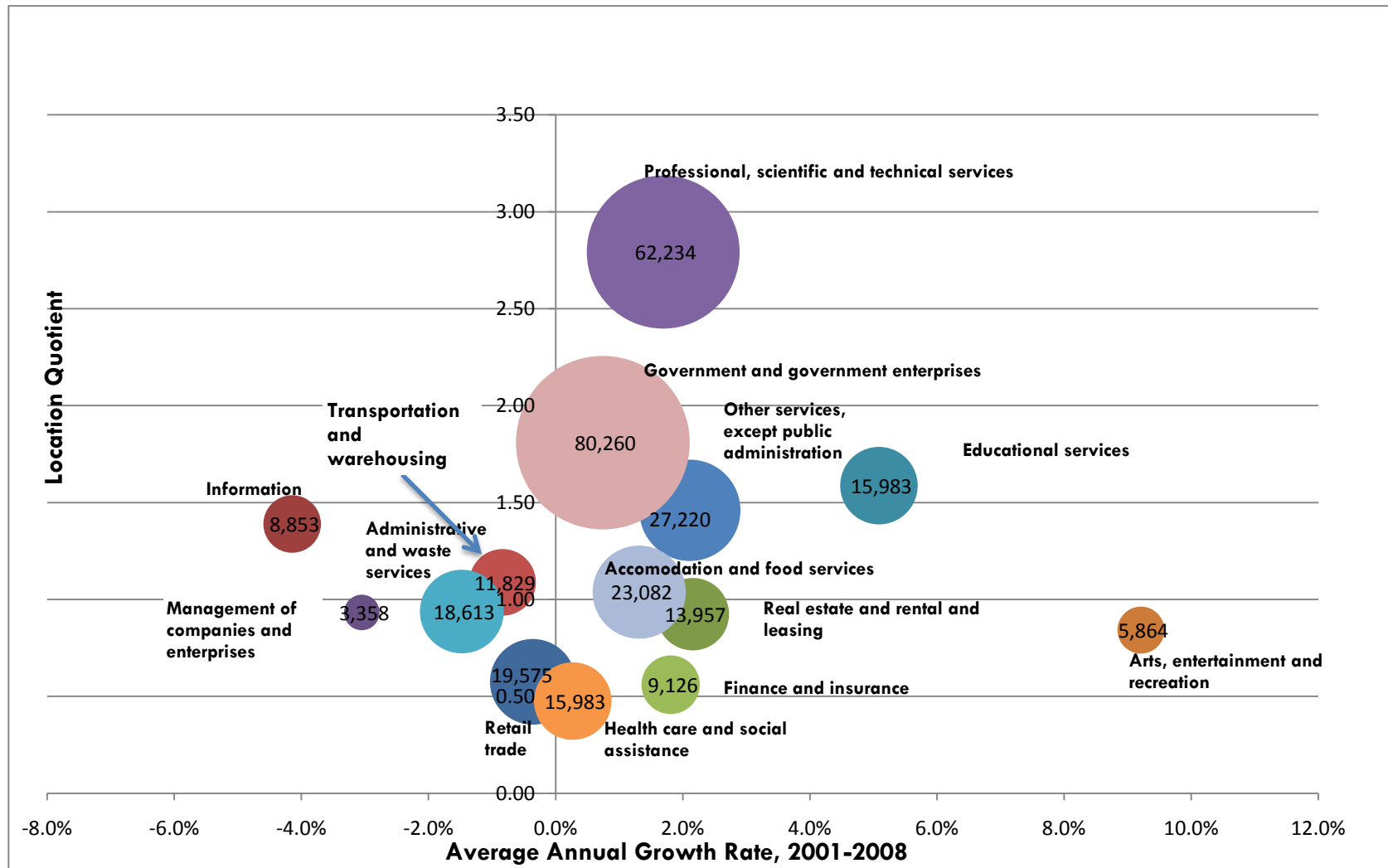


Figure 1.5.4 Alexandria/Arlington Industry Cluster (2-digit NAICS), 2008 Concentration and 2001-2008 Growth



1.6 Infrastructure Assets and Challenges

Transportation Infrastructure

Transportation has long been among the top public policy and infrastructure concerns in the Greater Washington Metropolitan Area. Aging and overburdened infrastructure, long commutes and poor air quality remain persistent regional challenges. The vast majority of Alexandria and Arlington employees commute into the region to work. Only 31 percent of Alexandria and Arlington employees live in the jurisdictions (Figure 1.6.1). Every day workers commute into the region from jurisdictions more than 40 miles away. These peripheral jurisdictions are suburban and exurban in nature, and thus not well served by public transportation. They are defined by land use patterns that are conducive only to the use of personal motor vehicles.

Within Arlington and Alexandria a number of multimodal transportation options are present, and demand and use of these facilities has grown significantly in recent years. Residents of the Greater Washington Metropolitan Regional Core (Alexandria, Arlington and DC) commute in single-occupancy vehicles (SOV) at much lower rates, and utilize alternative modes of transportation (transit, biking and walking) at much higher rates than residents of the inner and outer suburbs (Figure 1.6.2). The Washington Metropolitan Area Transit Authority (WMATA) operates Metrorail and Metrobus service that connects Alexandria and Arlington to the greater Washington region. Between Fiscal Years 2002 and 2007 annual passenger trips originating at Metrorail stations in Arlington grew by 30 percent and trips from stations in Alexandria grew by 17 percent (Figure 1.6.4). Annual passenger trips on local bus systems (ART in Arlington and DASH in Alexandria) also experienced significant growth in the first decades of the 21st century (Figure 1.6.5). Average Daily Vehicle Miles Traveled (DVMT), a standard measure of traffic volumes, declined nationally in 2008 and 2009 as a result of high gas prices and the economic recession. All types of roads have experienced declines in DVMT over the past several years (Figure 1.6.6).

Declines in DVMT in the Alexandria/Arlington region began in 2007 (Figure 1.6.5), though declines in DVMT on roads in Arlington began as early as 2005 and 2006, well before the high gas prices of the Summer of 2008 and the onset of the recession. The declines took place in the same period as the use of public transportation expanded, perhaps signaling a transition among local residents to the use of public transportation and limited period car rental options such as carshare (introduced in 2004) and more recently the DC and Arlington joint bike sharing program, Capital Bikeshare, introduced in 2010. Today, 17.9% of residents that live in the R-B corridor do not have a car, while less than 25% have 2 or more cars.^{xvii}

Industrial Uses

The City of Alexandria and Arlington County are seeking to retain and protect industrial uses within the region's urban environment.

A report, *Industrial Land Use and Zoning*, published by Arlington County in the year 2000, examined industrial uses in the county and the long-term trends impacting the ability of the county to retain industrial uses.^{xviii} The report noted Arlington's already limited industrial base had been in decline since the 1950s and cautioned that without special attention, industrial uses in the County could virtually disappear by 2020. The higher value of land in urban areas such as Arlington and intense competition from other land uses, along with a long term national transition from an industrially-based economy to a service economy, were cited as the key trends impacting industrial development in Arlington. An examination of Arlington County industrial land uses in the report found that two out of three businesses in areas then zoned industrial, were actually commercial in nature, and that more than 50 percent of industrial uses in the County at that time were located in the Four Mile Run Drive/Shirlington Road area. Despite the challenges in retaining industrial uses in Arlington County's urban, mixed-use and suburban environment, the Arlington County staff stated in their report their belief that some industrial uses, including warehousing, wholesale distribution, auto towing and research and development, provide tangible economic benefits for the citizens and businesses of the County. They recommended that the County seek to accommodate these uses, including where possible, in nonindustrial zoning districts.

The Alexandria Industrial Use Study published in July 2009 examined various economic questions concerning four industrial uses in the Eisenhower West (Virginia Paving Asphalt plant, the Covanta waste-to-energy facility, the Vulcan facility and the Norfolk Southern Railroad ethanol transloading facility).^{xix} The study examined the costs, risks, benefits and opportunities associated with redeveloping these industrial sites into mixed use communities, focusing on the development costs and opportunities for redeveloping these sites, the feasibility of relocating these uses, and the impacts and benefits of these uses in these locations. The report found that in the long-term redevelopment of these sites into mixed-use communities may have financial benefits, but that the City of Alexandria would need to be heavily involved to facilitate any successful redevelopment. The report also found that the industrial uses in the area provide important economic and public benefits and cited the fact that the Virginia Paving facility is an important asset to the area that has been in use for decades. The Covanta facility, which processes all of the solid waste of City of Alexandria residents and Arlington County residents, represents a significant investment of public resources by both jurisdictions and provides a critical public service.

Figure 1.6.1 Alexandria/Arlington Employees by Residence¹³

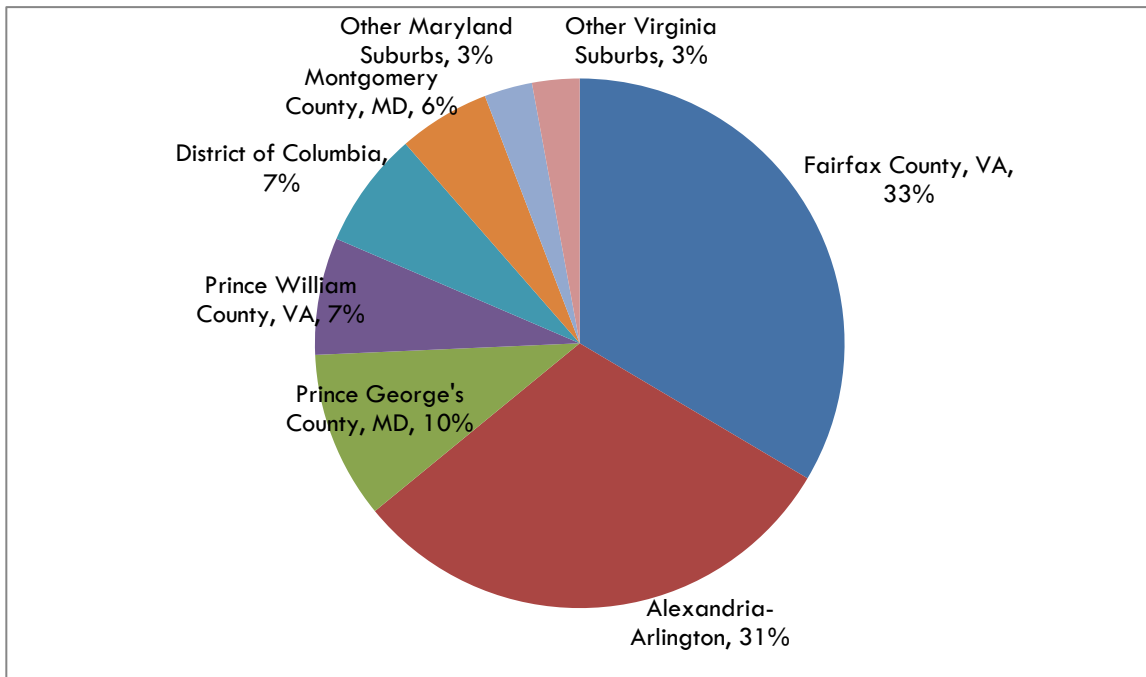
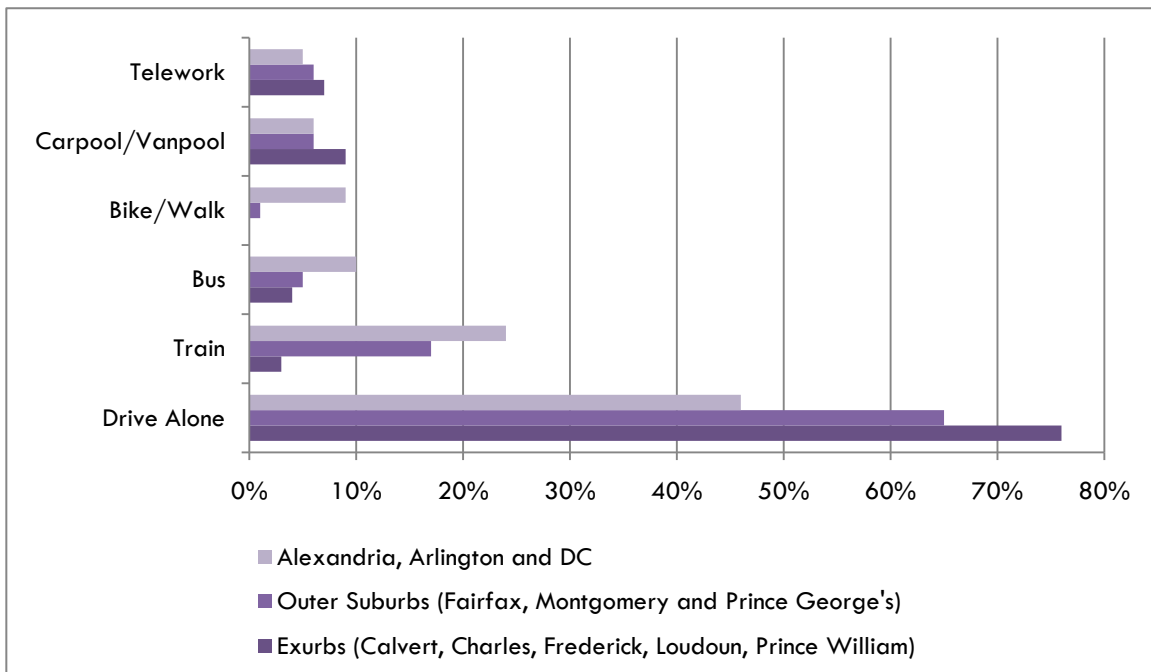


Figure 1.6.2 Commute Mode Splits, Greater Washington, DC Region¹⁴



¹³ Data Source: Arlington Economic Development

¹⁴ Data Source: Metropolitan Washington Council of Governments, 2010 State of the Commute Survey

Figure 1.6.3 Alexandria and Arlington Local Bus Service, Annual Passenger Trips, FY 2007- FY 2007¹⁵

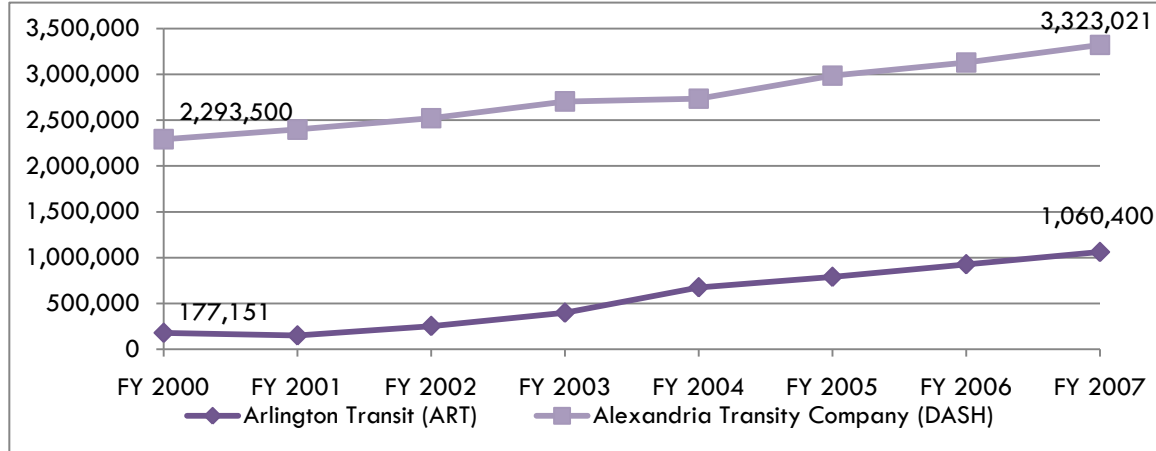


Figure 1.6.4 Metrorail Weekday Annual Passenger Trips, FY 2002 – FY 2007¹⁶

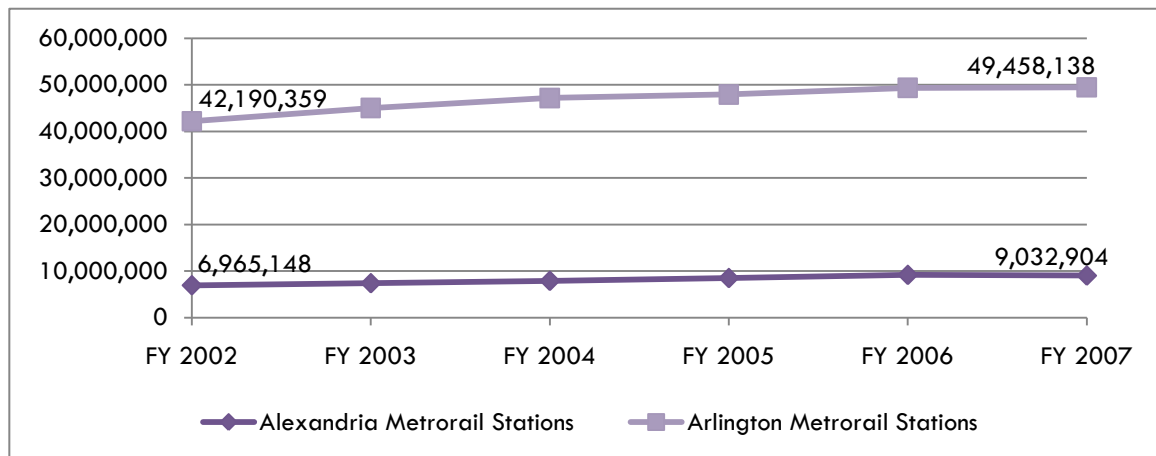
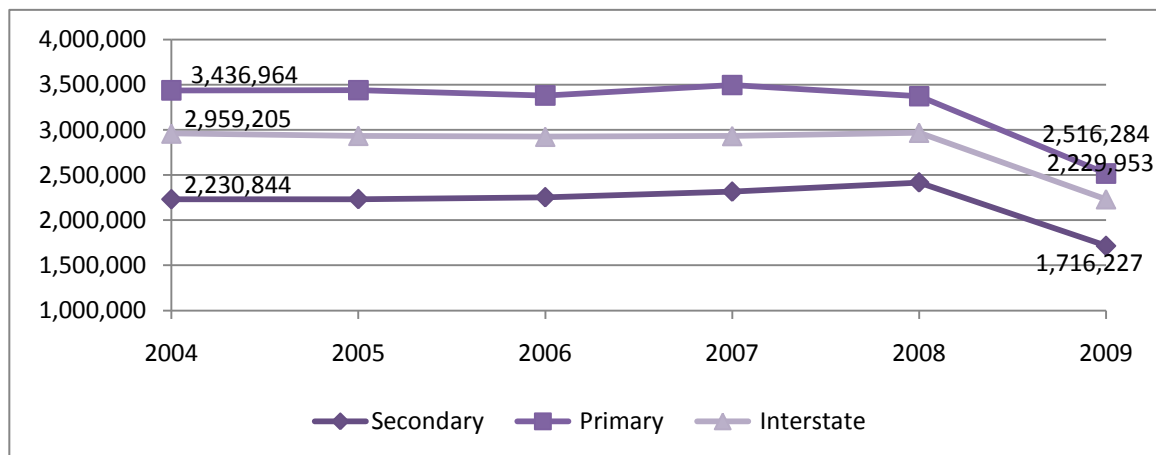


Figure 1.6.5 Average Daily Vehicle Miles Traveled by Road Type, Alexandria/Arlington Region 2004-2009¹⁷



¹⁵ Data Source: Northern Virginia Transportation Commission

¹⁶ Data Source: Northern Virginia Transportation Commission

¹⁷ Data Source: Virginia Department of Transportation, Traffic Data

1.7 Other Community Assets and Challenges

Housing Profile

The housing stock profile of the Alexandria/Arlington region differs significantly from the nation and the Commonwealth of Virginia (Figure 1.7.1). The far greater proportion of multifamily units found in the City of Alexandria and Arlington County reflect the region's urban development. In other communities around the country a high number of multifamily and renter households may signal that a community is comparatively more affordable. However, Alexandria and Arlington housing prices are relatively higher than in surrounding jurisdictions, particularly those on the exurban fringe of the Greater Washington, DC region.

Environmental Sustainability

The City of Alexandria and Arlington County are both national leaders among local jurisdictions in advancing environmental sustainability. Both jurisdictions are Virginia Municipal League Certified Green Governments at the highest (platinum) level of certification.

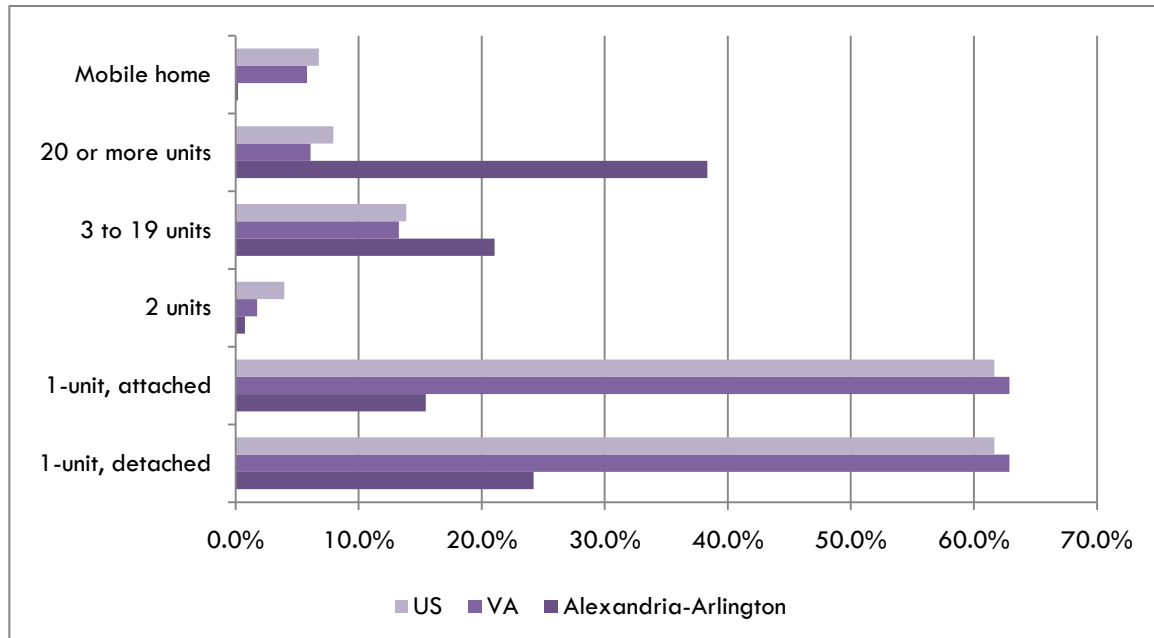
The City of Alexandria approved its Eco-City Environmental Action Plan (2030) in 2009.^{xx} The plan's goals and actions were created based on an extensive national best-practice policy review and online and traditional public involvement workshops. Among the plan's goals are reducing the City's greenhouse gas emissions to 80% below 2005 levels by 2050, enhancing and building on the Green Building policy, increasing the city's tree canopy to 40 percent by 2020 and generating 25 percent of the city's energy usage from renewable energy sources by 2020. The City of Alexandria was honored by ICLEI-Local Governments for Sustainability with a milestone award for completing a GHG Emissions Inventory and Setting Sustainability Improvement Goals as a part of the Eco-City Alexandria initiative. Among Arlington's successful environmental protection programs is the Arlington Initiative to Reduce Emissions (Fresh AIRE).^{xxi} Fresh AIRE's goal is to reduce Arlington County government's greenhouse gas emissions by 10% from 2000 to 2012, building off the county's success in reducing emissions 2.6 percent from 2000 to 2005. Fresh AIRE works not only with the Arlington County Government to reduce greenhouse gas emissions, but it also disseminates information and assists businesses and residents with reducing their greenhouse gas emissions. In 2011, Arlington County is working on establishing a Community Energy Plan. The Community Energy Plan project will establish energy goals and strategies for the entire County. This project will ultimately result in an energy plan that addresses the places where residents and employees use energy in the community – in homes, shops, offices, public buildings and other institutions – and offer strategies to: enhance Arlington's economic competitiveness, ensure reliable and affordable energy supplies, and demonstrate the County's long-term commitment to environmental responsibility.^{xxii}

Historic Preservation

The City of Alexandria's Old Town & Historic District was created in 1946, the third historic district created in the nation. Since the historic nature of the City is a primary

tourist draw, maintaining, restoring and promoting its historic resources are also an economic development priority. The Office of Historic Alexandria maintains seven city museums, and the City is home to a number of other historic sites and museums. Alexandria also has a well-regarded city archeology department.^{xxiii} Arlington County's Historic Preservation element of its Comprehensive Plan calls for the better integration of preservation values into County planning, land use and other policies, and to protect historic neighborhoods, corridors, commercial centers and civic buildings.^{xxiv}

1.7.1 Housing Stock Type, Alexandria/Arlington, Virginia and the United States



1.8 Existing Plans and Processes

This chapter refers to a number of planning studies, small area plans, redevelopment plans and retail studies, undertaken by the City of Alexandria and Arlington County. Both jurisdictions have extensive planning and public involvement processes.

Alexandria City Council's Strategic Plan established seven strategic planning goals, each with city council member and staff designations. The City of Alexandria's Department of Planning and Zoning currently has two Small Area Plans in development, three major development projects underway, eight initiatives ranging from a wayfinding program and zoning for small business and twelve plans completed or in implementation phases. Neighborhood level small area plans, open space and neighborhood level business area plans are among the plans currently being implemented. The Alexandria City Council recently adopted Eco-City Alexandria, an innovative environmental action plan, and it has several transportation plans currently underway.

Arlington County is guided by its Comprehensive Plan, which has eight individual elements, including a General Land Use Plan. Sector plans, zoning studies, revitalization plans and small area plans are also used to guide development and public investment. Arlington Economic Development produces a number of white papers each year, and is guided by its strategic plan.

This Comprehensive Economic Development Strategy is the first regional economic development plan, but not the first effort at joint planning for the jurisdictions. The City of Alexandria and Arlington County work together on workforce development issues through the Alexandria/Arlington Workforce Investment Board. The jurisdictions are also collaborating on a number of planning initiatives. The Alexandria City Council and the Arlington County Board held a joint meeting in October 2010, in which the elected officials discussed joint transportation planning in the Beauregard/Seminary and J-D/Potomac Yard areas. The City of Alexandria and Arlington County have plans to work jointly on new transportation, workforce development and child care plans in 2011.

Chapter 2 Central Issues

This chapter will present the central economic and workforce development issues in the City of Alexandria and Arlington County.

2.1 2005 Base Realignment and Closure Impacts

In May 2005 the Department of Defense (DoD) issued recommendations to the Base Realignment and Closure (BRAC) Commission to close and/or realign DoD agencies and installations throughout the country. BRAC is a process used periodically by the Department of Defense to identify excess military installations and assets, and to realign facilities to reduce costs or achieve other efficiencies. BRAC is commonly used to close obsolete military installations and to move DoD positions (military, civilian federal workforce and contractor) between installations. The BRAC law approved in November 2005 created multiple significant and long-lasting economic and transportation challenges for the Alexandria/Arlington region. The deadline for full implementation of the 2005 BRAC law is September 15, 2011.

The 2005 BRAC law requires that over **4 million square feet of leased office space in Arlington be vacated**. As a result, Arlington **will lose approximately 17,000 DoD jobs**, making the County's loss the largest of any other single jurisdiction in the United States. In addition to the loss of DoD positions, the County anticipates also losing a substantial number of contractor positions and other businesses associated with the relocating DoD agencies. Shortly after the BRAC law was passed in 2005, Arlington's BRAC Transition Task Force was formed to advise the County Board by identifying impacts and opportunities arising from the 2005 BRAC recommendations.^{xxv} Many of the recommendations of this task force, including the establishment of the BRAC Transition Center to assist workers and businesses impacted by BRAC and initializing a new planning process for the heavily BRAC-impacted Crystal City neighborhood have been enacted as the County has sought to proactively mitigate the impacts. The four key themes that directed the work of the Task Force were:

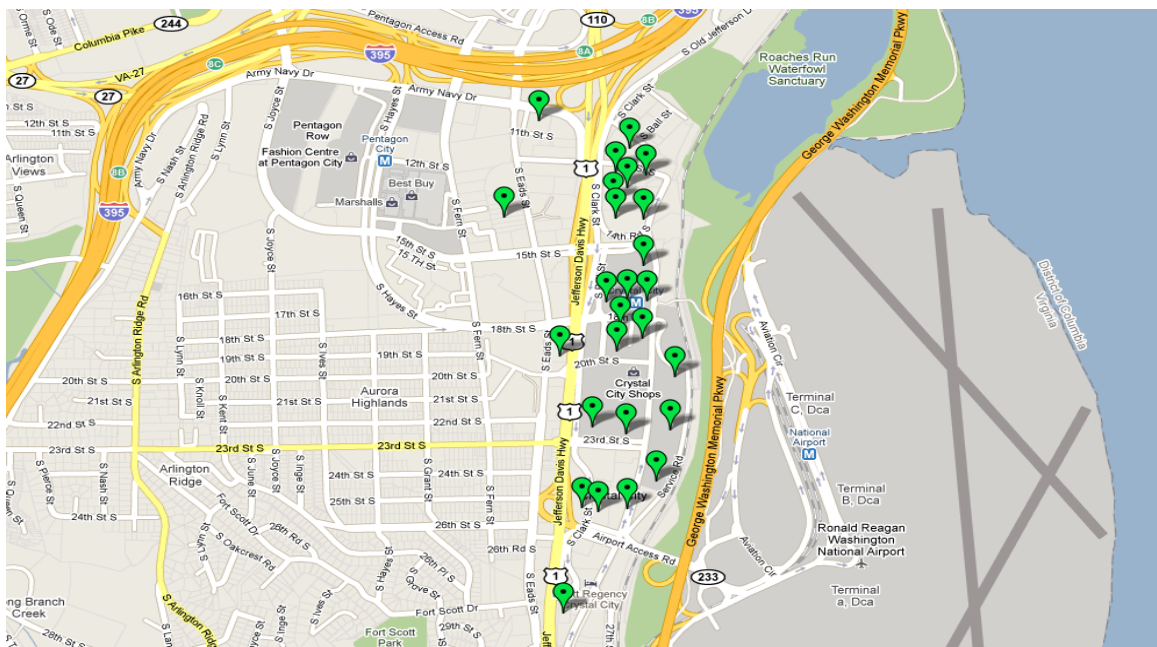
1. View BRAC impacts as an opportunity.
2. The uncertainties of timing about specific moves and the lack of information about workforce characteristics will continue throughout the BRAC transition period.
3. Think broadly about finding other economic anchors to replace DoD.
4. New programs and initiatives should have relevance beyond the immediate response to BRAC.

More than three-quarters of the leased office space that will be vacated in Arlington as a result of BRAC – **more than 3.2 million square feet distributed across 25 commercial office buildings – is located in Crystal City**. The re-leasing of this space will pose many challenges as many of the newly vacant space is located in buildings at least 30 years old that are functionally obsolete, with undersized floor plates, low ceiling heights and less efficient building systems. This space needs extensive renovation to make it competitive in the current commercial office market. This would have been a challenge even before the onset of the 2007-2009 recession and the lingering reluctance of private businesses to expand and hire new employees. In addition the emergence over the past five years of several new office submarkets in the Greater Washington, DC region that offer the same level of rents as Crystal City office space but with brand new office buildings has made an already challenging situation even more difficult.

Arlington County has sought to use this loss as an opportunity for development of the aging corridor neighborhood. In 2007, a redevelopment plan for Crystal City was

initiated per the recommendation of the BRAC Transition Task Force. At their September 28, 2010 Meeting, the Arlington County Board adopted the Crystal City Sector Plan. Among the many goals of this adopted plan are to ensure the economic sustainability of Crystal City by encouraging a greater mix of uses along with more open space and cultural facilities, while attracting and retaining private sector users of Class A office space. According to the plan itself it offers *“more than a simple remedy for the pressing circumstances arising from BRAC and an aging stock of office buildings. Rather, this Plan offers a comprehensive vision for the future of Crystal City, with an emphasis on improving the quality of the public realm. Opportunities to responsibly increase density, advance sustainability, provide energy security, increase residential offerings, enhance and expand a multi-faceted transportation system, increase the quality and quantity of public open space, and promote high-quality urban design have all been explored and incorporated into this document.”* The Crystal City Sector Plan strives to take advantage of the impact of the 2005 BRAC decision by establishing a framework for infrastructure investment and comprehensive redevelopment that will realize the neighborhood’s potential as a true 24-hour, multi-use activity center with a balance of residential and office uses supported by a strong and diverse commercial office tenant base that includes many private businesses.

Figure 2.1.1 Map of BRAC-Impacted Buildings - Crystal City



Map Source: BRAC Transition Center

On top of these challenges of identifying new potential, preferably private sector clients for Crystal City office space or new economically sustainable redevelopment uses for these sites, there remains a great deal of uncertainty as to the BRAC timeline in Crystal City. Despite the September 15, 2011 deadline for BRAC implementation, 73% of the BRAC impacted leases in Crystal City will expire after the deadline (Table 2.1). The uncertainty inherent in this situation has made it difficult for Arlington County to time its plans and actions with the impact of the loss of leased space in Crystal City.

Table 2.1.1 Lease Expiration Dates and Associated Square Footage: Crystal City

Time Frame		Leases		Sq Ft.
2010	10	15%	556,013	16%
2011 (before Sep 15)	7	10%	426,978	11%
2011 (after Sep 15)	2	3%	7,982	0%
2012	8	12%	492,174	14%
2013	11	16%	936,185	26%
2014	11	16%	347,218	10%
2015	15	22%	686,770	19%
2016 and beyond	4	6%	124,260	4%

Table Source: BRAC Transition Center

While the uncertainty surrounding the lease expiration dates makes it difficult to ascertain when the full impact of BRAC will be realized in Crystal City, the fact remains that eventually all BRAC-impacted buildings will be vacated by their DoD tenants. Arlington County is focused on the redevelopment of the neighborhood and finding new tenants for Crystal City office space, but these processes will likely take a number of years. In the interim, the base of small businesses that support the office sector in Crystal City, the dry cleaners, coffee shops and sandwich shops, are likely to see a decrease in their business that could be detrimental to their ability to survive. The transition of Crystal City from a largely public sector based market to one dependent nearly completely on the private sector will take many years and cause much economic hardship. The retail demand during this transition could decline by as much as one-third before it begins to recover, placing great stress on hundreds of small service and retail businesses. The pain of the transition will be felt by those dependent on a strong office market.

Figure 2.1.2 Aerial Photo of Crystal City



Photo Source: Crystal City Sector Plan

For the City of Alexandria, BRAC will result in a small net gain of DoD jobs, as the City will add **more than 6,400 new positions in 1.75 million square feet of new high-rise office space at BRAC-133** (the numerical designation given to Alexandria's Mark Center), but will lose 7,370 DoD positions located in other areas of Alexandria as a result of the 2005 BRAC law. While BRAC overall represents a net gain of jobs for Alexandria, the City will still need to find new tenants to fill the 1.42 million square feet of existing privately-owned commercial office space (1.32 million of which is leased) that will be vacated as a result of BRAC.

The Mark Center is the planned new location for the Washington Headquarters Service (WHS), and a number of other DoD agencies. The facility, now owned and currently under construction by the federal government, (while technically part of Fairfax County's Fort Belvoir), is on Mark Center property located at the intersection of Seminary Road and Beauregard Street at the I-395 interchange. Since the site is under federal ownership, the City cannot apply its local land use regulations to the site. While the City has worked closely with the DoD to address issues with the Mark Center building architecture, discussions and plans for absorbing the full impact of the new facility are ongoing. The Mark Center's location in the suburban Beauregard/Seminary corridor, with its residential neighborhoods and streets far from Metrorail has created a set of complex and costly transportation concerns that need to be resolved. In early 2011, the Transportation Research Board of the National Academy of Sciences issued a report that documented the infrastructure investment impacts of BRAC consistently exceeding the ability of local jurisdictions to meet them; the report called for greater federal assistance with transportation and infrastructure impacts of BRAC in the future.^{xxvi}

Figure 2.3 Mark Center Aerial Rendering Showing BRAC 133 Site



Mark Center Aerial Rendering Showing BRAC133 Site

Photo Source: DoD/BRAC 133 Project at the Mark Center, Belvoir New Vision

In February 2009, the City of Alexandria established its BRAC-133 Advisory Group, tasked with identifying solutions to transportation and other issues associated with the development of the Mark Center. According to an Army commissioned Transportation Management Plan for the Mark Center, 57 percent of employees will commute in single-

occupancy vehicles. One of the plan's goals is to have 40 percent of Mark Center employees arrive by a transportation mode other than a single-occupancy vehicle through a comprehensive transportation demand management effort, minimizing the transportation impact to the Beauregard/Seminary neighborhood. The Mark Center will include a transit center that will be served by multiple regional transit agencies, including bus and shuttle services traveling from Metrorail stations. The Mark Center is scheduled to open in September 2011.^{xxvii}

2.2 Dependence on the Federal Government

The Alexandria and Arlington economy is highly dependent on federal government and federal government contracting related employment. As noted in Section 1.5, government and government related enterprises comprise 26 percent of the total employment base in the Alexandria/Arlington region. Employment in the closely related professional, scientific and technical services sector that includes government contracting makes up another 20 percent of the region's total employment. Analysis in a 2003 Arlington Economic Development report, *The Federal Presence in the Urban Village*, found that in Arlington the federal government held one-third of all leased office space (11.4 million square feet), and it owned an additional 7.3 million square feet. In total, in 2003 the federal government leased or owned 46 percent of all Arlington office space. Federal contractors tend to cluster their offices near those of their federal clients, greatly amplifying the impact of the federal presence in the Alexandria/Arlington region.^{xxviii}

Fostering a diversification of the Alexandria/Arlington firm and employment base is a significant challenge, but one that is becoming increasingly necessary and urgent. As detailed in Section 1.5 federal civilian employment in the region has not grown significantly in the region in recent years, and a number of trends, from enhanced federal building security standards, the aging and retirement of much of the existing federal workforce, possible reductions in the size of the federal government and increased telework capabilities, will reduce the federal demand for office space in Alexandria and Arlington.

Enhanced Security Standards Anti-Urban Bias

Enhanced security standards for federal buildings (Anti-Terrorism Force Protection (ATFP) and Interagency Security Committee (ISC)) have an anti-urban bias, requiring new federal buildings to be designed with significant setbacks from the street, the installation of various types of building barriers, and securing entire buildings from non-federal uses. Arlington's urban mixed-use villages in which buildings contain a variety of ground-level retail, restaurant and other uses are not compatible with these new federal security standards. It will be difficult to make existing and new buildings compliant with the enhanced security standards. Constructing buildings compliant with the security standards will be more expensive in urban environments like Alexandria and Arlington, and put the region at a competitive disadvantage in attracting federal agencies. Like BRAC, this is a federally created hardship with potentially substantial negative impacts to Alexandria and Arlington.

None of the existing office space in Arlington County currently meets these enhanced security standards for Department of Defense buildings.^{xxix} Arlington has participated in the development of a new facility for DARPA through a rather intense subsidy in order to create an ATFP standard building. DoD has adopted the Interagency Security Council standards for security, but even those are difficult to meet in an urban environment with a large number of older buildings. The cost of hardening has been about \$10 million per building and few sites permit adequate standoff distances. The difficulty in meeting building force protection standards puts Arlington and Alexandria at a distinct competitive

disadvantage in retaining a share of the overall declining base of federal office space in the future.

Retirements and the Aging Federal Workforce and Skilled Labor Shortage

In Fiscal Year 2009 fully 28 percent of the federal workforce was eligible for retirement, but just 8.8 percent of those eligible (2.3 percent of the total federal workforce) retired, fewer retirements occurred than were anticipated. The Office of Personnel Management (OPM), which provides human resources services for the federal government, had been anticipating that federal retirements would peak between 2008 and 2010, but federal retirements actually hit a seven-year low in 2009. Lower stock prices, home values and other economic uncertainties caused by the 2007-2009 recession caused many federal employees to delay planned retirements. However with a rapidly aging federal workforce, the projected “tsunami” of retirements cannot be delayed indefinitely.^{xxx} Employees over the age of 50 comprised 32 percent of all federal employees in 1998. As of December 2010 they comprised 42 percent of the federal workforce, and employees over the age of 40 comprised 70 percent of the 2.1 million strong federal workforce. In Virginia employees over the age of 50 comprise 44 percent of the federal workforce. Among Virginia’s 147,152 federal employees, 44 percent were over the age of 50 and 73 percent were over the age of 40 in December 2010.^{xxxi}

Among employees in federal service in Fiscal Year 2009 the OPM projected that nearly half of the current federal workforce (48 percent) will be eligible to retire in 2015. While there is the possibility that many of the federal positions that will be vacated as a result of retirements over the next 5-10 years will be eliminated, and not filled, there will still be a number of openings in the federal workforce. If one half of the current federal workforce in Virginia retired over the next 10 years more than 73,000 federal positions would be vacated or eliminated.^{xxxii}

Telework

Many federal employees in the Alexandria/Arlington region already telework at least one day a week. The anticipated further expansion of teleworking in the federal government could reduce federal demand for office space in Alexandria and Arlington even if a significant reduction in the size of government does not occur. In 2010 the U.S. Congress passed the Telework Enhancement Act of 2010, which President Obama is expected to sign into law. This law requires each executive agency to establish a policy under which eligible agency employees may be authorized to telework and to notify all telework eligible of all employees.

Across the federal government in 2008, 5 percent of the total workforce or 102,900 employees were teleworking. Among teleworking employees 64 percent of these were teleworking at least 1-2 days per week. Between 2007 and 2008 alone the number of federal employees teleworking rose by nearly 9 percent.^{xxxiii}

Summary

Reduced federal demand for office space in Arlington will have a significant impact on the Alexandria/Arlington regional economy for the next several decades. The Alexandria/Arlington region will undoubtedly lose thousands of jobs due to the loss of federal employment and federal office space consumption in the region. As federal offices leave Arlington and federal employment ceases to have a stabilizing influence on regional employment, impacts in all facets of the community can be expected, including fewer retail and other support business, and lower demand for local real estate and lower residential housing prices. This inevitable reduction in federal employment and federally-leased office space has the potential to stymie an otherwise vibrant regional economy without proactive action now to diversify the regional economy.

2.3 Workforce Development and Affordability

The Alexandria/Arlington workforce is predominately employed in high-skill, high-wage professions. As shown in Figure 1.5.1, nearly half (46 percent) of the regional workforce is employed in just one of two advanced information sectors: government and government enterprises or professional, scientific and technical services. Yet, workers in advanced information economy sectors are not the only workers needed to ensure a healthy, fully functional and equitable regional economy. The region is increasingly recognizing the need to provide more resources for economic and workforce development efforts focused on skilled trade and middle-skilled professions, i.e. those professions that do not require a four-year Bachelor's degree, but typically require some form of post-secondary education.

Workforce Development

Nationally, 50 million new jobs are expected to be created by 2018, of which 30 million will require postsecondary training. It is expected that the national will fall short of meeting the need for skilled labor about 3 million workers.^{xxxiv} This shortage is already impacting both highly skilled and middle skilled occupations, even with the current post-recession high unemployment rates. A Wall Street Journal published in February 2011 detailed worker shortages in fields ranging from high tech to construction.^{xxxv}

In the Commonwealth of Virginia and in the Alexandria/Arlington region the challenges of recruiting and training the next generation of skilled labor in a number of trades and key non-information sectors are becoming increasingly apparent. According to National Skills Coalition analysis, at the state level in Virginia around 50 percent of jobs are in middle-skill occupations, but only 37% of the state's workers likely have the appropriate training for these jobs.^{xxxvi}

According to *Decoding Generational Differences*, a 2008 study by Deloitte LLP, nationally, there are about 16.5 million students in grades 9-12, of which it is anticipated that only a third will complete a bachelor's degree within 4-6 years of high school graduation. This results in approximately 5.4 million college grads potentially coming into the labor pool over the 4 year period from 2011-2014. The graduates will be entering into a competitive post-recession labor force, but one in which a shortage of skilled labor is anticipated due to the oncoming wave of Baby Boomer retirements.^{xxxvii}

Regionally, the gap between the need for employees with mid-level skills and the availability of these employees is known to exist in a number of sectors. There is an acute local shortage of those that are well qualified to fill middle-skilled jobs, which comprise 30-50 percent of all the jobs in the Greater National Capital Region.^{xxxviii} Labor shortages are also known to exist among utility workers, electricians, truckers and other transportation workers, nurses and health care assistants, public safety professionals (police, firefighters), child care workers, clerical workers, computer/informational technology specialists and numerous other middle-skilled professions. The Alexandria/Arlington Workforce Investment Board (WIB) is working with industry representatives in a number of these sectors to identify ways in which regional workforce development services can be tailored to help fill specific occupational needs. With

additional resources the WIB could more fully address existing critical workforce development needs in a greater number of sectors and occupations.

Local Utilities

In the energy sector, local utility providers Washington Gas, Dominion Energy and PEPCO will soon lose 40-50 percent of their current workforce due to retirements, a situation faced by utility firms around the nation. These firms are already having difficulty recruiting employees with the appropriate skills to fill open positions. The WIB is working to fill this gap, providing English as a Second Language (ESL), math and other technical training seminars geared specifically to future local utility workers.

Health Care

A 2005 study, "The Health Care Workforce Shortage: An Analysis of the Scope and Impact on Northern Virginia,"^{xxxix} authored by PriceWaterhouse Coopers and commissioned by the Northern Virginia Health Care Workforce Alliance, examined shortages in the 24 health care occupations across the greater Northern Virginia region.¹⁸ The study included a survey that found a total of 2,800 open or vacant positions, most of them skilled occupations that require some form of advanced education and/or licensure/certification. In the 24 occupations examined in the study, 13 had vacancy rates of more than 10 percent. The largest vacancy rates found were in the nursing profession (registered nurses, nurse managers, nurse practitioners, licensed practical nurses, nursing aides and certified nurse assistants), which accounted for two-thirds vacancies. Over a quarter (26 percent) of the licensed practical nurse available positions were unfilled at the time of the study. Other health care occupations with extreme vacancy rates examined in the study included speech pathologists (27 percent), physical therapists (17 percent) and physical therapy assistants (26 percent) and occupational therapists (16 percent).

The shortage of health care workers in the occupations studied is only expected to worsen over the coming decade. The retirement of the baby boomer health care workforce and an aging population with increased health care needs are coming at time when Northern Virginia and regional post-secondary institutions are not producing enough skilled health care graduates to fill open positions. The Northern Virginia Health Care Workforce Alliance projected that estimated total health care workforce shortages will grow from 7,791 in 2010 to 16,595 in 2020.

Child Care

A study of the availability of child care by Arlington Economic Development^{xl} staff found that a shortage of child care workers with the required level of training and certification is one of the chief constraints to the growth of much needed new child care facilities.

Information Technology/Computer Specialists

The Alexandria/Arlington WIB has had contact with many firms seeking qualified information technology (IT)/computer specialists, and is aware of a local shortage of professionals in this occupation. The One Stop Employment Centers in the region, Alexandria JobLink and the Arlington Employment Center, often refer clients interested in

¹⁸ The study's definition of Northern Virginia included the following jurisdictions: Cities: Alexandria, Fairfax, Falls Church, Manassas and Manassas Park; Counties: Arlington, Fairfax, Prince William and Loudoun Counties.

IT/computer work to private external training organizations, such as Insyte Computer Training Center (<http://insytrtraining.com>).

Public Safety Professionals

The City of Alexandria and Arlington County are both in urgent need of additional firefighters and emergency medical technicians (EMTs). In a December 2009 letter to City of Alexandria Vice Mayor Kerry Donnelly and Councilman Frank Fannon, Chair of the Alexandria Emergency Medical Services Council Pamela Copley stated that because of the shortage of trained paramedics and ambulances every day more than two-thirds of calls for emergency medical services (EMS) are answered first by fire trucks unequipped to handle medical emergencies. This shortage of EMTs and ambulances has also lead to City of Alexandria EMS calls being answered by ambulances from the Metropolitan Washington Airports Authority, Fairfax County, Arlington County and other jurisdictions on a daily basis.^{xli}

Arlington County is facing these same challenges. Nearly every day the County faces a “critical” shortage of ambulances and EMTs, when the number of paramedic units ready to respond to a call reaches only one or zero. Every day Arlington relies on ambulance crews from Metropolitan Washington Airports Authority, Fairfax County, and the City of Alexandria to respond to EMS calls. In extreme shortages Arlington sometimes moves a fire crew into an unstaffed ambulance.^{xlii} However, Arlington County Fire Department is also experiencing its own labor shortage and it is currently in “heavy recruitment mode.”^{xliii}

Workforce Affordability Challenges

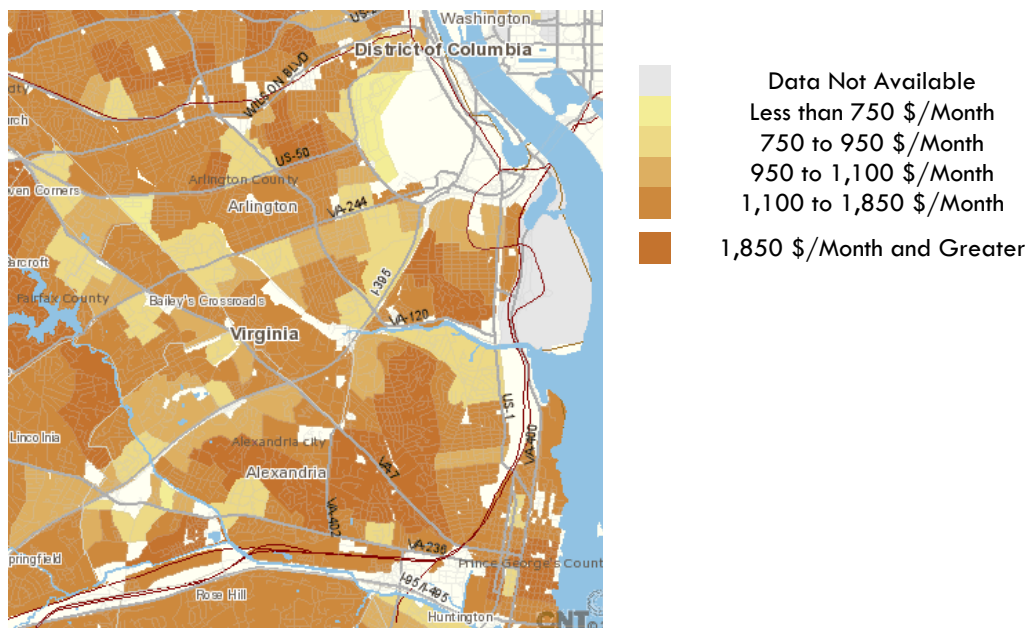
The dominance of high-skill, high wage employment has also increased the cost of living in the Alexandria/Arlington region, making it difficult for households with middle incomes to afford to live in the region. In some locally critically undermanned occupations there are many qualified, possibly underemployed individuals living in other regions, but the high cost of living in the Alexandria/Arlington region makes relocating here prohibitive.

Housing

The rapid housing price appreciations of the early 2000s far exceeded real income growth, and as a result there remains a significant mismatch of housing prices relative to median incomes. In stark contrast to national trends, the Washington Business Journal reported that home prices in October 2010 were up 8.4 percent compared to 2009, reaching a median price of \$327,700.^{xliv} *Priced Out: Persistence of the Workforce Housing Gap in the Washington, D.C., Metro Area*, a report by the Urban Land Institute, found an undersupply of 40,000 housing units affordable to middle income households in the six major employment centers in the Greater Washington DC region, including the City of Alexandria. In the City of Alexandria, workforce housing units for 1-person households are adequately supplied and the undersupply is entirely in those units affordable for 2-4 person (family) households. As a result of this undersupply middle income households find it difficult to afford housing in the Alexandria/Arlington region without some form of public assistance.^{xlv}

When transportation costs are added to housing costs (H + T), a different picture of affordability emerges. The City of Alexandria and Arlington County are the *most affordable* jurisdictions in the Greater Washington DC region under the H+T measure. The higher cost of housing in the Alexandria/Arlington region is offset by the far lower transportation costs, as commutes in the City of Alexandria and Arlington County are shorter and are often taken on public transportation, biking or walking, all less expensive than commuting via private automobile. This does **not** however make it easier for middle class families to live in the Alexandria/Arlington region, since a household's ability to afford a housing unit is normally calculated by lenders and leasing agents only on a the ratio of housing costs to income.

Figure 2.3.1 Monthly Housing Cost by Census Block Groups in Alexandria and Arlington¹⁹



Source: Center for Neighborhood Technology, H + T Affordability Index

Healthcare, Food and Childcare

Aside from housing costs, the higher costs of other essentials including healthcare, food and childcare also squeeze middle and low-income households in the Alexandria/Arlington region. A report by the Food Research and Action Center found that in 2008 and 2009, the Congressional Districts (8th and 11th) that encompass the Alexandria/Arlington region have a Food Hardship Rate, a measure of the number of families that lack the money to buy an adequate amount of food, of 7-8 percent., which is low when compared with a rate of 16 percent for Virginia and a fourth quarter 2009 national food hardship rate of 18.5 percent.^{xlvi} However, a November 2010 profile of the Arlington Food Assistance

¹⁹ Average Monthly [Housing Costs](#) are calculated as the weighted average of [Average Monthly Ownership Costs](#) and [Average Monthly Rent](#) for households in a [Block Group](#).

Center on the PBS News Hour noted that in the past two years demand at the center has risen more than 50%, with more than 3,300 people per week now receiving a weekly ration.^{xlvii} Nationally, in 2008 the average premium purchased through an employer provided health care plan was \$12,680, a figure often too high for middle and low income families in the Alexandria/Arlington region to afford.

Finally, the scarcity of affordable full-day child care facilities in the main commercial corridors and mixed-use centers of Alexandria and Arlington is a challenge for working parents at all ends of the economic spectrum. In Arlington's Rosslyn-Ballston and Jefferson Davis Corridors there are just 15 full-day child care centers, with a total licensed capacity of 1,284 children. Only 10 of these centers provide care for infants. All of these licensed child care facilities are fully enrolled and have waiting lists. Increasingly, employers have recognized the role that the presence of quality, affordable childcare has on their ability to attract and retain creative talent in all sectors of the economy. A 2010 Arlington Economic Development report, *Child Care in the Commercial Corridors*^{xlviii}, noted that in the past five years the majority of firms that AED has sought to attract have cited access to child care as a "strong factor in their location decision making." This report identified several existing challenges to accommodating more child care centers in the main commercial corridors in Arlington County. They included misconceptions about child care centers among developers, building owners and brokers in an urban development pattern that is characterized by its small lot sizes and high rents, and the shortage of qualified child care workers.

The City of Alexandria, facing the same child care constraints and challenges, has teamed up with Arlington County to establish Smart Beginnings, an innovative public-private partnership that is focused on creating and sustaining a comprehensive early care and education system for Northern Virginia. Through Smart Beginnings, the City of Alexandria and Arlington County are proactively working together to increase the number of high-quality early childhood education programs and to build a stronger infrastructure to support child care through outreach to all relevant community and business leaders. In October 2010 Smart Beginnings received Smart Beginnings Alexandria/Arlington an 8-month grant from Virginia Early Childhood Foundation to implement the Virginia Star Quality Initiative (VSQI) Pilot for Family Child Care Homes. This grant will allow ten home-based child care providers to provide valuable feedback on the new VSQI procedure and receive quality mentoring from January to July 2011. In the past Smart Beginnings has provided free training to home-based child care providers on how to improve the quality of their programs.^{xlix}

Chapter 3 Action Plan

This chapter will present the vision and goals of the Alexandria/Arlington Comprehensive Economic Development Strategy. It will also present a list of projects identified to meet the central economic development issues raised in Chapter 2 and the general economic challenges presented in Chapter 1.

3.1 Vision and Goals

Vision

The Alexandria/Arlington region will be a diverse, vibrant and creative region supported by a sustainable and inclusive environment for workforce and economic development that enables the growth of businesses large and small, fosters secure, attractive residential and commercial neighborhoods and enhances the overall quality of life.

Goal 1. Sustainable Economy: The Alexandria/Arlington region will employ sustainable economic development practices that contribute meaningfully to a fiscally sound region by growing the commercial tax base and ensuring an equitable balance of the assessed commercial and residential property values.

Objectives:

- Mitigate the Challenges Created by the 2005 BRAC Action
- Partner with Area Economic Development Allies
- Support and Build Partnerships that Enhance Public-Private Collaboration
- Enhance Small Business Support
- Increase Tourism and Visitor Spending
- Maintain Strong Fiscal Health
- Facilitate the Growth of the Region's Green Economy

Goal 2. Innovative, Creative Workforce: The Alexandria/Arlington region will foster an innovative and creative workforce through collaboration between employers and education and one-stop career centers.

Objectives:

- Find creative and affordable solutions to workforce housing and transportation
- Develop career pathways based on current and future employer demand
- Develop integrated workforce strategies to support employers' efforts in filling the vacancies left by retiring baby boomers

Goal 3: High Quality of Life for Businesses and Residents: The Alexandria/Arlington region will cultivate secure, high quality commercial and residential corridors that provide exceptional amenities that allow all businesses and residents to prosper.

Objectives:

- Encourage Distinctive, Secure Urban Villages
- Foster a Retail Mix that Creates a Vibrant Place
- Build and Partner for Community Amenities
- Adopt Policies that are Environmentally and People Friendly
- Recognize the Arts as Essential
- Conduct Business and Resident Research
- Affordable, Efficient and Clean Transportation
- Support and Enhance Public School Quality

Goal 4. Superior Business Environment: The Alexandria/Arlington region will be recognized for its superior business-friendly environment, which includes world-class facilities, infrastructure and systems.

Objectives:

- Provide Resources and Support to the Existing Business Community
- Attract new Commercial Investments and new Business Locations, with a focus on those in Targeted Industry Sectors
- Maintain and Improve Important Business Infrastructure
- Provide Secure Business Infrastructure
- Provide win-win incentives
- Encourage Desirable Real Estate Development
- Continue Efforts to Achieve “Best” Governance

3.2 Prioritized Projects

Projects are prioritized into three tiers, and then further prioritized within each tier:

- Tier I Projects: Immediate and Urgent Needs
- Tier II Projects: Regional Innovation Cluster Development
- Tier III Projects: Workforce Development and Support

Project Name	Description	Prioritization Rating	Funding Source(s) (Confirmed and Potential)	Total Cost (Estimate)	Lead Agency	Partners (Confirmed and Potential) ²⁰
BRAC Transition Center Funding	Continue operating the BRAC Transition Center to support workers displaced by BRAC relocations.	Tier I, Priority 1	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$2mm	AED	WIB, Arlington DHS
Crystal City/Potomac Yard Infrastructure Improvements	Support the ongoing transformation and transportation investments being made in the Crystal City and Potomac Yard (Route 1) corridor with additional infrastructure and streetscape improvements that facilitate economic development.	Tier I, Priority 2	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$25mm	AED and AEDP	
Pentagon City Telework Center	Construct a Telework Center in close proximity to the Pentagon to accommodate workers that need to be near the Pentagon on a temporary or extended basis to primarily serve workers displaced by BRAC.	Tier I, Priority 3	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$25mm	AED	
Transportation Trade Industries Training Program Development	Respond to emerging needs for new transportation trades expertise with the introduction of light rail and priority bus service in the Crystal City-Potomac Yard Transitway, Columbia Pike, and the City of Alexandria's four additional planned dedicated transitways.	Tier I, Priority 4	Public/Private Foundation Grants, Corporate Sponsorships. WIA	\$500k	WIB	AEC, APS, ACPS, JL, NVCC

²⁰ See the end of this section for a full listing of all partners by acronym.

Project Name	Description	Prioritization Rating	Funding Source(s) (Confirmed and Potential)	Total Cost (Estimate)	Lead Agency	Partners (Confirmed and Potential) ²⁰
Transitway Infrastructure Improvements	Support the transportation investments being made in new dedicated transitways planned for the City of Alexandria and Arlington County (including but not limited to the Columbia Pike Streetcar and the City of Alexandria's planned transitways) with additional infrastructure and streetscape improvements that facilitate economic development.	Tier I, Priority 5	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$10mm	AED and AEDP	
Develop Model of Open-Government and Civic Engagement Services	Research best practices, understand stakeholders' needs and concerns, and implement a strategy for a model of civic engagement and open government.	Tier I, Priority 6	Public/Private Foundation Grants, Corporate Sponsorships, Local Funding	\$1 mm	Arlington County Government/Alexandria City Government	ALCOC, ARCO, Local BIDS, Hispanic COC
Industry Cluster Support and Outreach	Provide targeted technical assistance services that support emerging industry associations and clusters via local industry associations, revitalization organizations, minority business organizations, Business Improvement Districts and Chambers of Commerce and reduce barriers to new business formation and recruitment.	Tier II, Priority 1	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$1 mm	AED and AEDP	ALCOC, ARCO, Local BIDS, Hispanic COC, CPPO, ECDC EDG
Emerging and Innovative Industry Marketing/Outreach	Business recruitment outreach to non-government serving private firms that are in emerging and innovative industries.	Tier II, Priority 2	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$500k	AED, AEDP, WIB	
Customized Industry Cluster Training Programs	Create a new set of industry customized training/certification opportunities as defined by the AEDP, AED and the WIB, with local employer guidance and collaboration. Some of these classes may be offered in Spanish, to be taken in conjunction with technical English as Second Language training.	Tier II, Priority 3	Public/Private Foundation Grants, Corporate Sponsorships, WIA, Local Funding	\$100k	WIB	APS, ACPS, NVCC, JL, AEC
Workforce Housing Support	Increase support for workforce housing programs, including providing funds for the rehabilitation of buildings to provide additional workforce housing units for public sector and service industry workers.	Tier III, Priority 1	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$50mm	CPHD and EID	APAH

Project Name	Description	Prioritization Rating	Funding Source(s) (Confirmed and Potential)	Total Cost (Estimate)	Lead Agency	Partners (Confirmed and Potential)²⁰
Low and Moderate Income Working Family Support Services Portfolio Enhancement	Respond to emerging affordability and workforce development needs to support low and moderate income working families.	Tier III, Priority 2	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$1 mm	WIB	
Mobility Enhancements Subsidy	Provide a subsidy to reduce monthly public transportation costs (commuter rail, metro rail, metro and local bus and vanpools) for public sector and service industry workers commuting to Alexandria and Arlington.	Tier III, Priority 3	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$2mm	AEC, APS, ACPS, JL	AED, AEDP, NVCC
Child Care System Support	Provide new training and career placement opportunities for child care workers. Provide vouchers for local child care programs to working families unable to afford the cost care. Support the expansion of rate-reduced preschool education (Head Start and Montessori in Arlington) in APS and ACPS. Construct childcare training facilities at secondary schools. Additional or post-graduation work at this facility could lead to secondary school students obtaining their CDA credential. Public School employees would also have access to affordable, onsite childcare.	Tier III, Priority 4	Public/Private Foundation Grants, Corporate Sponsorships, Local Assistance	\$3mm	WIB, APCS, APS	Smart Beginnings
Educational and Training Facility Enhancements	Expand, renovate and create new educational and workforce development facilities as needed, including but not limited to the construction of residence halls at the Northern Virginia Community College to serve the needs of special populations (i.e. veterans, former foster children, etc.), creating a state-of-the art multipurpose construction training facility, renovating and repurposing of functionally obsolete educational facilities to meet current needs, adding additional specialized space at secondary schools and local Career Centers, such as a culinary industry incubator or transitional college facilities.	Tier III, Priority 5	Public-Private Educational Facilities Infrastructure Act, Foundation Grants, Corporate Sponsorships, Local Assistance	\$10 mm	AEC, APS, ACPS, JL	AED, AEDP, NVCC

Project Name	Description	Prioritization Rating	Funding Source(s) (Confirmed and Potential)	Total Cost (Estimate)	Lead Agency	Partners (Confirmed and Potential) ²⁰
Career Services for Baby Boomers	Create a new set of training/certification opportunities, focusing on soon to retire/retired professionals who are interested in rejoining the workforce.	Tier III, Priority 6	Public/Private Foundation Grants, Corporate Sponsorships, WIA, Local Funding	\$100k	WIB	APS, ACPS, NVCC, JL, AEC
Integrated Mentoring/Career Coaching Program	Provide individual mentors/career coaches throughout all One Stop and Public School Career Center programs, managed through an electronic tracking system and with an annual program evaluation component. This is a recognized best practice in workforce development.	Tier III, Priority 7	Public/Private Foundation Grants, Corporate Sponsorships, WIA	\$75k	WIB	APS, ACPS, AEC, JL
Regional Co-Op/Community Work Experience (CWE) Program	A study would be commissioned to examine the feasibility, benefits, and costs of creating Co-Op/CWE (a cooperative education/job training program based on direct connections between local employers and secondary school) opportunities in Alexandria and Arlington. Should this study indicate that a Co-Op program is feasible in the region, it would be established as an ongoing partnership program with local post-secondary education providers and the WIB.	Tier III, Priority 8	Public/Private Foundation Grants, Corporate Sponsorships, WIA	\$150K	WIB	Post-Secondary Education Providers, Chambers of Commerce

Partners (Potential and Confirmed) Listing:

ACPS=Alexandria City Public School
AEC= Arlington County Department of Human Services/Arlington Employment Center
AED= Arlington County/Arlington Economic Development Department
AEDP=Alexandria Economic Development Partnership
ALCOC=Alexandria Chamber of Commerce
APAH= Arlington Partnership for Affordable Housing
APS=Arlington Public School
ARCOC=Arlington Chamber of Commerce
Arlington DHS=Arlington County Department of Human Services

Chambers of Commerce=All Chambers of Commerce serving the region
CPRO= Columbia Pike Revitalization Organization
Hispanic COC= Greater Washington Hispanic Chamber of Commerce
JL=City of Alexandria/JobLink
Local BIDS=Local Business Improvement Districts
NVCC=Northern Virginia Community College
Post-Secondary Education Providers=All post-secondary education providers serving the region
Smart Beginnings=Alexandria/Arlington Smart Beginnings
WIB=Alexandria/Arlington Workforce Investment Board

Chapter 4 Evaluation

This chapter will establish a set of performance indicators to gauge the success of the implementation of the regional initiatives and projects undertaken as a result of this CEDS. The CEDS performance indicators are long-term measures of the success of the overall set of strategies and projects undertaken as a result of the CEDS. The CEDS Annual Report will include the performance indicators table, adding columns for the data by year for each successive annual report.

4.1 Performance Measures

AEDP and AED independently track a number of economic development and real estate development indicators. As a result of this CEDS process, AEDP and AED staff agreed to cooperatively track a set of key selected economic development and real estate development indicators (table 4.1.1) for inclusion in the CEDS Annual Report. Additional project specific indicators and indicator improvement goals may be added as warranted, and these will also be included in the CEDS Annual Report.

Table 4.1.1 Economic Development and Real Estate Development Indicators

Indicator	Indicator by Year
At-Place Employment	
Number of Jobs	
Number of Business Establishments	
Average Gross Weekly Wages	
Labor Force	
Number of Residents in Civilian Labor Force	
Number of Employed Residents	
Unemployment Rate	
Office Absorption	
Square Feet of Net Office Absorption	
Office Vacancy	
Office Vacancy Rate	
Housing Sales	
Average Days on the Market: Single Family Homes	
Average Days on the Market: Townhomes	
Average Days on the Market: Condominiums	
Tourism	
Hotel Occupancy Rate	
Average Daily Room Rate	
Washington Area Indices	
Consumer Price Index: Washington Area	
Washington Area Economic Indicators	
Washington Area Coincident Index	
Washington Area Leading Index	
Air Transportation	
Total Aircraft Operations at DCA	
Total Passengers at DCA	
Commercial Building Permit Activity	
Square Feet Permitted for New Construction	
Square Feet Permitted for Tenant Fit-Out	
Residential Building Permit Activity	
New Single Family Detached Units Permitted	
New Townhomes Permitted	
Square Feet Permitted for New Multifamily Units	

Chapter 5 Documentation

This chapter will review and document the process through which this CEDS was created.

Work on this Comprehensive Economic Development Strategy began in the Summer of 2010, when a core staff team was formed to lead its development. This staff team was led by Dave Remick, Executive Director, Alexandria/Arlington Workforce Investment Board, and included Cynthia Richmond, Deputy Director, Arlington Economic Development, Stephanie Landrum, Senior Vice President, Alexandria Economic Development Partnership, as well as consultant Shana Johnson. Throughout 2010 the staff team worked to prepare the appropriate background data and analysis for the CEDS, explore options for putting together the CEDS goals and objectives, and to identify potential CEDS Strategy Committee members.

The CEDS Strategy Committee met for this first time on January 25, 2011. At this meeting the Strategy Committee was introduced to the purpose of the CEDS, and given a draft of CEDS Chapters 1-4 for their review. The Strategy Committee members were given three weeks to review the draft and provide their input on the plan's data and analysis and any additions that they wanted to the plan. On February 25, 2011 the CEDS Strategy Committee convened a focus group of workforce and educational partners from around the region, including local public schools and community college representatives as well workforce development program leaders. Those attending this focus group provided their input on the draft CEDS plan and a sense of where the need for additional infrastructure investment exists in workforce and educational development programs exists in the region. A draft project list was sent out to the CEDS Strategy Committee for their review during the first week of April 2011. A final CEDS meeting was held on Thursday, April 14, 2011 with the purpose of prioritizing the projects. The meeting notes and attendance lists for all of these meetings are found in the CEDS Appendix.

The goals and objectives in Chapter 3 of this plan were developed based on an extensive public process to develop economic and workforce development goals for plans developed in both jurisdictions for individual strategic plans. The goals and objectives from these two plans were very similar, and were merged to form the goals and objectives of the CEDS with very little modification.

The Alexandria City Council Strategic Plan, adopted in June 2010, was the source of Alexandria priorities and initiatives included in the Comprehensive Economic Development Strategy (CEDS). That strategic planning process took full advantage of the City's active and engaged citizenry. From October 2009 through the early weeks of 2010, City Council members convened nearly 40 meetings to discuss the strategic direction of the City.

To provide greater access to the strategic planning discussion, the City, for the first time, offered the public the opportunity to directly post comments to the City website, alexandriava.gov, and allowed those comments to be publicly viewed in their unedited form. A majority of meetings held by Council member teams were videotaped and quickly

made available online so the public could have the opportunity to review the meeting discussion in the context in which it occurred. In all, more than 500 people participated in various strategic planning discussions and many more viewed strategic planning information, videos and comments on the City website.

The thoughts and opinions of community interest groups, representatives of City boards and commissions, City staff, recognized subject matter experts and the public were offered through many strategic planning discussions. The goal statements, objectives, initiatives and indicators of performance included in the strategic plan result from that input.

The Arlington Economic Development Commission launched the preparation of their first ever economic county-wide development strategy in October 2006 when members of the EDC began reaching out to business and community organizations to learn their concerns and desires. Over a 2 year period, more than 15 organizations representing a broad array of businesses, neighborhoods and citizens held thoughtful discussions and made meaningful suggestions that were incorporated into the development of the goals and strategies in the framework. Adopted by the Arlington County Board in November 2009 after a public work session, progress in implementing the strategies identified in the Economic Development Strategic Plan "Arlington's Framework for Prosperity" are monitored by the EDC and reported to the County Board annually.

The Alexandria Economic Development Partnership and Arlington Economic Development both currently track a number of economic and workforce measures to assess the impact of their strategic plans and activities. The CEDS staff committee examined the list of available measures and selected performance measures that they determined best fit with the goals, objectives and issues analyzed in the CEDS. The CEDS Strategy Committee then reviewed this list of performance measures and provided their input on this list.

Public comment on the draft final version of this CEDS plan took place for a one-month period, from May 10, 2011 to June 10, 2011. The CEDS plan was posted at the website: ceds.uservoice.com, an interactive site that allows visitors to view and express their support on all of the comments received, as well as to post their own. The City of Alexandria, Arlington Economic Development, the Alexandria/Arlington Workforce Investment Board and ACTion Alexandria, a civic engagement focused initiative of a community foundation (ACT for Alexandria), all provided and promoted the ceds.uservoice.com link on their websites to encourage public comment. The Alexandria/Arlington Workforce Investment Board also used their Twitter account (@aawib) to encourage its followers to read and comment on the plan at ceds.uservoice.com.

Two comments were received during the public comment period, and both were addressed in the CEDS plan (Table 5.1).

Table 4.1.1 CEDS Draft Plan Comments and Actions to Address

Comment Title	Comment (Unedited)	Action Taken
Expansion on Progress Indicators	While tracking progress annually is excellent and crucial to monitoring the success of projects, it may be important to establish annual goals for each of those indicator categories. This will provide guidance for what may be attainable and can establish "milestones" that can be celebrated or provide opportunities to explore alternative strategies if goals are not being attained.	This language was added the Chapter 4: Performance Measures, "Additional project specific indicators and indicator improvement goals may be added as warranted, and these will also be included in the CEDS Annual Report."
Goal 3: Providing quality of life, needs to include the quality of school system.	There is a discrepancy between north and south arlington factors for quality of life. Quality of schools was not mentioned in the document. If the schools are great in all region of the county, workers will choose to bring there family, work in the shorter commute for employees and stay to maintain the tax income for the county. Quality of life will improve. I think the county can improve other amenities, but if there is no family to spend with, what will be the point.	An objective was added to Goal 3, "Support and Enhance Public School Quality."

Ultimately, this CEDS plan will remain a living document, with the required annual update being produced by the staff at the Alexandria/Arlington Workforce Investment Board with input from members of the CEDS Strategy Committee.

Appendix: Plan Citations

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