APRIL 2022



COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

LAKE COUNTY, ILLINOIS

Lake County Partners

TIP STRATEGIES

CONTENTS

INTRODUCTION 1
- PROJECT APPROACH 1
- STRATEGIC FRAMEWORK 2
- MOVING FORWARD 3

SUMMARY BACKGROUND 4
- DEMOGRAPHIC AND SOCIOECONOMIC DATA 6
- STRATEGIC GROWTH AREAS 11
- SWOT ANALYSIS 12

STRATEGIC ACTION PLAN 13
- GOAL 1. COMPETITIVE POSITIONING 13
- GOAL 2. TRANSFORMATIONAL DEVELOPMENT 15
- GOAL 3. COMMUNITY ENGAGEMENT 17

APPENDIX A. EVALUATION FRAMEWORK 20

APPENDIX B. SWOT ANALYSIS DIAGRAMS 21

APPENDIX C. STRATEGIC GROWTH AREAS 23
- INTRODUCTION 23
- MEDICAL SUPPLY CHAIN 30
- FINANCIAL & BENEFIT SERVICES 32
- TECHNICAL & PROFESSIONAL SERVICES 34
- INDUSTRIAL & CONSUMER SUPPLIES 36

APPENDIX D. ECONOMIC DEVELOPMENT RESOURCES 38

APPENDIX E. ACKNOWLEDGEMENTS 39
- CEDS STEERING COMMITTEE 39
- ROUNDTABLE AND WORKSHOP PARTICIPANTS 40

INTRODUCTION

Lake County, Illinois, (the County) is a picturesque region located along the shores of Lake Michigan, north of downtown Chicago. It is one of the largest counties in the Chicago metropolitan area, with over 714,000 residents, according to the most recent US Census. Although a significant percentage of the County's commuters flow into Chicago and surrounding communities for work, the area is also home to dynamic and diversified companies that span industries from life sciences to manufacturing to high tech industries that draw workers in.[1] Proximity to downtown Chicago and O'Hare International Airport, combined with distinctive communities and easy access to Lake Michigan, make the region a natural destination for individuals and industry.

These advantages, however, have not translated to broad prosperity. Lake County struggles to attract a younger demographic and a number of its communities are under-resourced. Those communities that have historically lacked investment have not benefited from the region's overall success. It has become clear that a more inclusive approach to economic development is required—one that recognizes the needs of all residents and jurisdictions.

This *Comprehensive Economic Development Strategy* (CEDS) recognizes the need for fresh initiatives that build trust across the community and bring thoughtful growth to Lake County. Although economic development has traditionally focused on traded sector businesses, led by business recruitment, communities are acknowledging that equitable growth is a critical issue directly impacting economic success. This realization brings in its wake a greater focus on issues as wide ranging as attainable housing, quality childcare, and a thoughtful commitment to sustainability and the natural environment. Although it would be outside the scope of this plan to address all of these concerns, this plan identifies the impact that otherwise peripheral issues have on economic resilience. A framework for business growth needs to take into account the changing post-COVID-19 landscape as well as the needs of disadvantaged communities throughout the region. One organization alone cannot be charged with moving these initiatives forward. For this plan to be successfully implemented, it must have the support from traditional and non-traditional partners.

PROJECT APPROACH

The planning process was led by TIP Strategies, Inc. (TIP), and the Lake County CEDS Committee (CEDS Committee), comprised of members representing a variety of interests from both the public and private sectors. The project launched in the spring of 2021, beginning with robust background research and data analysis. Leveraging and integrating previous planning work is a necessary component of a CEDS and this plan builds on work already underway, as well as makes recommendations to scale programs where appropriate to serve larger populations across the County. Data analysis for the CEDS included review and compilation of multiple datasets from public and proprietary sources. This analysis of economic, demographic, and industry data was delivered separately via an interactive data visualization platform. Insights from this work were incorporated into an analysis of Lake County's strengths, weaknesses, opportunities, and threats (SWOT) and are outlined in the Demographic and Socioeconomic Data section of the CEDS.

In addition to an extensive quantitative analysis, the TIP team met with dozens of public and private sector leaders during focus group and interview sessions to understand the economic development opportunities and challenges facing Lake County. This insight, combined with findings from the quantitative analysis and TIP's expertise, led to the development of a series of goals, strategies, and action items, which frame the CEDS. The

[1] 2019 Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES); TIP Strategies, Inc. More than one-half of workers living in Lake County (52.8 percent) traveled outside the County for their primary job in 2019, while a similar share of Lake County jobs (53.5 percent) was filled by workers residing outside the County who commuted into Lake County for work.

second phase of the project focused on identifying and refining goals and strategies to ensure an action-oriented plan. The project's final phase focused on implementation, including strategy prioritization and partner identification. The planning process culminated with an implementation workshop to identify the actions that need to occur in the first 30 days to move the highest priority goals forward. Although the plan is designed to guide the County's economic development efforts over the next five years, it strongly positions the region for growth beyond that timeframe. Furthermore, the CEDS is designed to be a dynamic plan that can be refined and updated to take advantage of new opportunities as they present themselves.

STRATEGIC FRAMEWORK

The strategic framework helps ensure the CEDS is built around the priorities and values identified by Lake County stakeholders and leadership during the planning process. It ensures these concepts are fully integrated into the plan, beginning with the vision statement that ultimately guides the strategic recommendations, followed by the guiding principles, which are reflected in every goal and strategy. An overview of recovery and resiliency is outlined as part of the framework to highlight the importance of these factors, particularly considering the current COVID-19 public health crisis. This framework also aligns with the CEDS requirements outlined in US Economic Development Administration (EDA) guidelines.

VISION

A well designed comprehensive economic development strategy is built on a strong vision statement. While the CEDS guides economic development efforts over a 5-year period, the vision statement reflects where the region hopes to be in 10 to 15 years. The vision statement was developed by members of the CEDS Committee, with broad-based community input. It provides the basis for the plan to take advantage of regional opportunities and address vulnerabilities. Building on the vision, the strategies and actions in the plan will move the region forward. In partnership with community leaders and stakeholders across Lake County, the following vision statement was created.

*Lake County is committed to **equitable growth** that ensures a **vibrant** and **resilient** economy.*

GUIDING PRINCIPLES

In collaboration with the CEDS Committee, four guiding principles were identified for the plan. These guiding principles are the common thread uniting all the goals, strategies, and action items throughout the CEDS.

- **Partnerships**. Build and enhance partnerships across the region to advance economic opportunity for all.
- **Equitable Growth**. Seek to understand, address, and dismantle the root causes of income disparity, along with the historic and existing barriers to participation in the local economy.
- **Recovery and Resiliency**. Target efforts that prepare Lake County to avoid, withstand, and recover from economic shocks and the impacts of climate change.
- **Connectivity.** Embrace the symbiotic relationship between Lake County and the greater Chicagoland region, as well as recognize the role economic development has outside of County boundaries.

RECOVERY AND RESILIENCY

Throughout the planning process, Lake County leaders emphasized the need to incorporate recovery and resiliency strategies into the CEDS. Furthermore, the importance of recovery and resiliency is evident with their inclusion as a guiding principle. As a result, strategies and actions designed to advance these themes are woven

throughout all three goals in the Strategic Action Plan. These strategies and actions highlight both economic resiliency and environmental sustainability measures to strengthen the region. Based on the current economic fluctuations brought about by the COVID-19 pandemic, it is more important than ever to prepare and position the region for future disruptions. Although the pandemic has impacted everyone, data shows that populations without access to reliable healthcare and high-quality jobs were disproportionately affected by its devasting economic implications. Climate change is expected to have similar impacts on communities, putting already vulnerable populations at greater risk for displacement or economic hardship. Therefore, recovery and resiliency strategies must go beyond hardening infrastructure systems and include actions such as improving educational attainment rates and facilitating access to quality jobs.

According to the US EDA definition of economic resilience for a CEDS plan, **recovery** refers to an economic uptick following a disruption (recession or depression), whereas **resiliency** refers to three distinct characteristics: "the ability to recover quickly from a shock, the ability to withstand a shock, and the ability to avoid the shock altogether." These economic shocks might or might not be predictable. However, one thing seems certain. Given the increasing frequency of economic disruptions across the world, whether they be from climate change or new technological advancements, COVID-19 is not likely to be the last disruption the region will face. By planning for and implementing resiliency-focused strategies and actions, such as diversifying the economy, strengthening infrastructure systems, and promoting equitable growth, Lake County's long-term economic position will be stronger.

MOVING FORWARD

Lake County has the resources and institutions to be successful. There remain, however, distinct economic development challenges that, if not addressed, could endanger the area's competitiveness. Comparisons with peer and aspirational communities across the United States suggest assertive actions are needed to elevate and position the region for future prosperity. Not only does Lake County need to consider its positioning within the Chicago area, but also in the broader context of the Midwest and nationally. Development patterns in Chicago's collar counties are as relevant as those in Wisconsin's Kenosha and Racine Counties across the Illinois state line. To compete in today's competitive landscape, the region must capitalize on its strengths, while addressing issues such as housing, educational attainment, and entrepreneurial development.

Leveraging the Strategic Action Plan and fostering collaboration among partners and stakeholders will position the County to ensure equitable access to economic opportunity for all residents. The CEDS process brought together public and private sector leaders from across the region to determine the path forward. Through the planning process, three goals were identified for the region to act on. These goals, along with strategies and actions, can be found in the Strategic Action Plan. The first goal, Competitive Positioning, centers on steps for elevating Lake County to compete on the global stage. Strategies and actions under this goal are broad based and influence multiple areas across economic development. The second goal, Transformational Development, focuses on the built environment, from site development to infrastructure, and supports strategies identified under the other two goals. The third goal, Community Engagement, recognizes the role that quality of place plays in economic development for residents and visitors.

Going forward, representatives from across the County would benefit from continuing to meet on a regular basis. This step would ensure leaders stay informed about Countywide initiatives and work more collaboratively so that all Lake County residents have access to the same opportunities for advancement. Unlike an organizational strategic plan, a CEDS is designed to guide efforts across multiple organizations and jurisdictions; it will take leadership from partners across the region to drive the plan's implementation. Furthermore, the CEDS is designed to be a dynamic plan that can be updated and refined to reflect new opportunities, including federal and state funding streams, to bring projects to fruition.

SUMMARY BACKGROUND

Lake County is situated in the northeast corner of Illinois, bordering Wisconsin and Lake Michigan. Cook County and the city of Chicago are directly south of Lake County, and McHenry County lies to the west. Lake and McHenry are also two of the five counties that make up Chicago's collar counties and are included in Chicago's Metropolitan Statistical Area and Combined Statistical Area (MSA/CSA). Despite experiencing business growth over the past decade, the Chicago MSA saw a population decline of approximately 64,000 residents from 2010 to 2020 (see Figure 6). While it is still the third largest MSA in the United States, this outmigration is a major issue for the region's economic well-being. Lake County is no exception to this pattern. It is the firm conviction of those involved in this planning process that Lake County can—and must—grow its population as well as its business base.

Although it is too early to fully understand the impacts of COVID-19 on migration patterns, Lake County appears to be well positioned to attract new talent, with high quality-of-life amenities. While the majority of Lake County's residents are White (61.6 percent), the County has a sizeable Hispanic community (21.7 percent), and smaller Black (6.5 percent) and Asian (7.6 percent) populations. Lake County's demographics closely resemble the United States and the state of Illinois, with one notable exception—the relative size of the County's Black population is about half that of state and national averages. Lake County's larger-than-average Hispanic population and slightly larger Asian population comprise the difference.

The region has a variety of cultural amenities and Lake County is highly rated in SMU DataArts 2020 Arts Vibrancy Index.[2] The Arts Vibrancy Index scores every county in the United States, based on categories including arts dollars, arts providers, government support, socioeconomic, and other leisure characteristics. Cook County and the city of Chicago rank slightly higher than Lake County, primarily due to a larger number of hospitality establishments per capita. Cook County also ranked significantly higher in government support, receiving a higher percentage of state arts dollars and state arts grants. This high ranking is not surprising given Chicago's position in the state and larger business and tourism economy. Lake County economic developers and community leaders recognize the importance the arts and culture industries have to the region's economy, as well as its positive impact on quality of life for both residents and tourists.

In addition to arts and cultural amenities, the region benefits from extensive natural resources. More than 10 percent of Lake County land—in excess of 30,000 acres—is managed by Lake County Forest Preserves, with the mission to maintain land for recreation and conservation. Along with contributing to a high quality of life, forest land provides numerous advantages to the region, such as carbon sequestration, ground water filtration, and flood control. Lake County residents and visitors have access to an extensive network of state and local parks, including recreational opportunities on Lake Michigan and inland lakes and rivers. Among these recreational assets is the Fox River waterway, an important ecological resource and the busiest inland recreational waterway per acre in the US.

Also of economic development significance is Lake County's relatively flat topography. Although this characteristic can make development easier, the County's proximity to Lake Michigan and its abundance of inland bodies of water makes the region prone to flooding around these watersheds.[3] Terrain impacts floods and relatively flat land means that flood waters may cover the land for days, or even weeks, before dissipating. These risks are only expected to increase as a result of a changing climate, with stronger and more frequent rainfalls.[4]

---

[2] SMU DataArts decided not to publish its *2021 Arts Vibrancy Index Report* to stand "in solidarity with the arts organizations that were forced to close" and the artists and staff who lost employment due to the COVID-19 pandemic. An updated index is anticipated in 2022.

[3] Flood Factor, First Street Foundation, Flood Maps, https://floodfactor.com/county/lake-county-illinois/17097_fsid.

[4] Lake County Stormwater Management Commission, Rainfall Data Analysis: Weather and Increased Rain PDF, https://www.lakecountyil.gov/DocumentCenter/View/30573/Weather-and-Increased-Rainfall-PDF.

Flooding events not only impact housing and commercial development, but also the road and rail infrastructure the region relies on for the movement of goods and services. Increased rainfall can overburden stormwater systems, which can have a detrimental impact on the entire Lake Michigan watershed. More intense storms, including winter snow, pose threats to the utility infrastructure, including power and telecommunications lines. In addition to the Chicago Metropolitan Agency for Planning (CMAP) comprehensive plan, *On To 2050*, Lake County as well as most cities and villages within the county, have comprehensive plans[5] that outline infrastructure needs and investments to bolster regional economic development.

Finally, Lake County's transportation infrastructure is one of its strongest competitive advantages. By sharing a border with Wisconsin, Lake County is part of a larger two-state transportation grid. Interstate 94 connects communities with Milwaukee to the north and Chicago to the south; passenger and commercial rail networks provide regional and national connectivity; and O'Hare International Airport offers one of the finest international gateways in the world. Lake County is included in the Metra[6] commuter rail system service area, which serves as a critical connector between employees and employers across the regional laborshed. Additionally, Pace Suburban Bus[7] service provides connectivity across Lake County and into Cook County, however north-south service is concentrated in the eastern half of Lake County, with limited east-west connectivity, especially in the southwestern part of Lake County (see Figure 2).

FIGURE 1. METRA RAIL SERVICE MAP

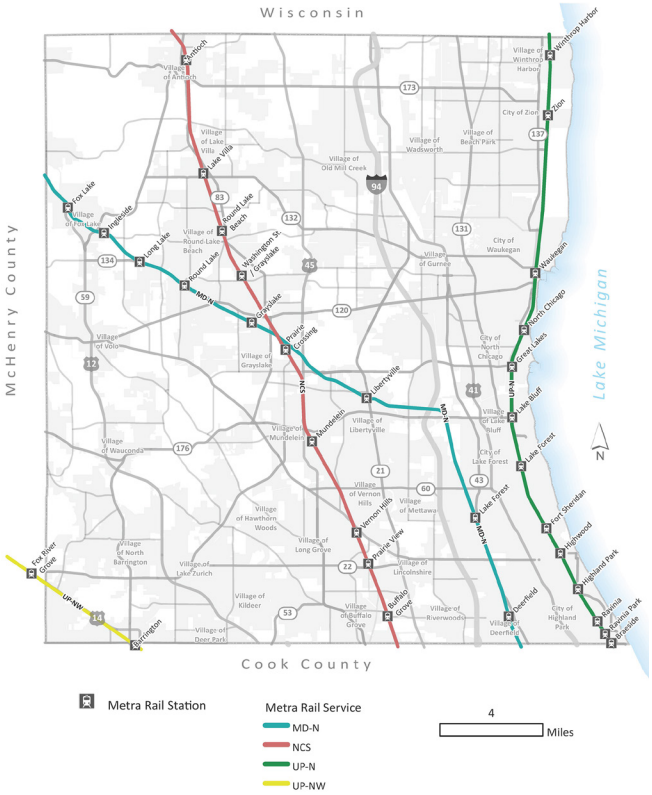
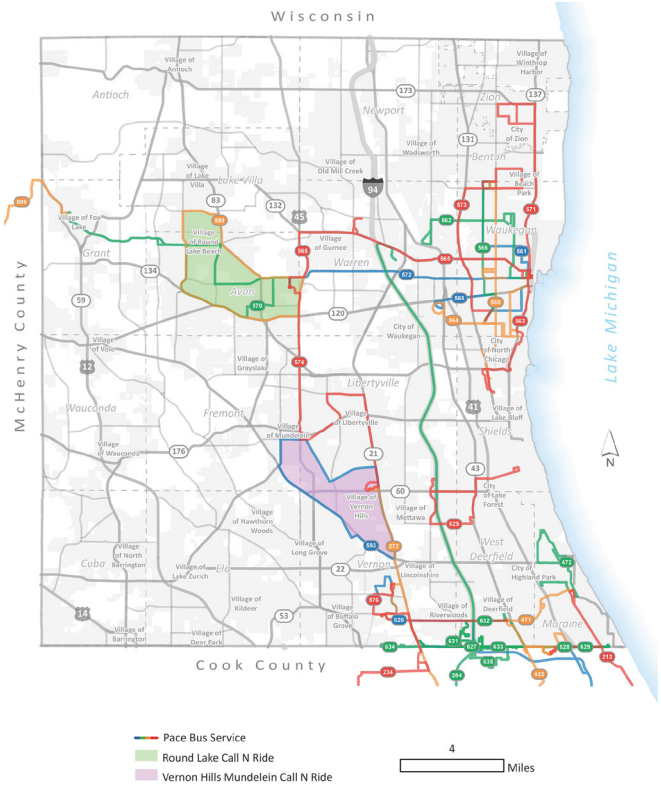


FIGURE 2. PACE SERVICE MAP



Source: Lake County Division of Transportation.

[5] Most cities and villages in Lake County have their own comprehensive plans, which can be obtained by directly contacting the municipality: https://www.lakecountyil.gov/BusinessDirectoryII.aspx?lngBusinessCategoryID=32.

[6] Metra, *On Track to Excellence: 2018-2022* (strategic plan), November 2017, https://metra.com/sites/default/files/assets/booklet9.25x8.5_metrastrategicplan2018-22_lr.pdf.

[7] PACE Suburban Bus, *Driving Innovation: The Pace Strategic Vision Plan*, September 2021, https://www.pacebus.com/sites/default/files/2021-10/Driving%20Innovation%20Plan_September%202021.pdf.

Locally, the Waukegan National Airport, serves as a critical alternative to O'Hare for small aircraft serving businesses and aviation enthusiasts. The Waukegan National Airport has a US Customs office to streamline international arrivals features and a manned air traffic control tower. Milwaukee Mitchell International Airport is also a convenient option for both commercial and charted cargo flights, especially for those residing in the northern part of the County. Despite these transportation-related strengths, the County continues to struggle with east-west connectivity. The *Lake County 2040 Transportation Plan*,[8] as well as the *Lake County Strategic Plan*,[9] address broader infrastructure goals and strategies for the region as it continues to grow. Opportunities to further enhance Lake County's infrastructure to support business development and increase resiliency are outlined in the Strategic Action Plan.

DEMOGRAPHIC AND SOCIOECONOMIC DATA

As part of the strategic planning process, TIP Strategies conducted a broad analysis of Lake County's economic health. The study included comparison metrics for the Chicago metropolitan area, Illinois, and the US overall. The work also benchmarked a handful of close-in suburban counties in major US metropolitan areas. These selected benchmark counties reflect characteristics reminiscent of Lake County: affluent populations adjacent to the central city or county of a major urban agglomeration; significant employment clusters, especially corporate headquarters or large manufacturing facilities; and limited supplies of vacant or buildable land relative to outlying exurban counties.

FIGURE 3. PEER BENCHMARK COUNTIES

SUBURBAN BENCHMARK COUNTY	METROPOLITAN STATISTICAL AREA
Chester County, PA	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD
Collin County, TX	Dallas-Fort Worth-Arlington, TX
Cobb County, GA	Atlanta-Sandy Springs-Alpharetta, GA
Middlesex County, MA	Boston-Cambridge-Newton, MA-NH
Montgomery County, MD	Washington-Arlington-Alexandria, DC-VA-MD-WV
Oakland County, MI	Detroit-Warren-Dearborn, MI
Orange County, CA	Los Angeles-Long Beach-Anaheim, CA
San Mateo County, CA	San Francisco-Oakland-Berkeley, CA
Westchester County, NY	New York-Newark-Jersey City, NY-NJ-PA

Source: TIP Strategies, Inc.

The socioeconomic analysis was completed as part of TIP's discovery phase of outreach and consultation. Initial data collection began in June 2021 and was delivered to Lake County Partners in August 2021 in an interactive data visualization using Tableau Reader. The key findings of this analysis, summarized below, informed and guided the direction of the Strategic Action Plan.

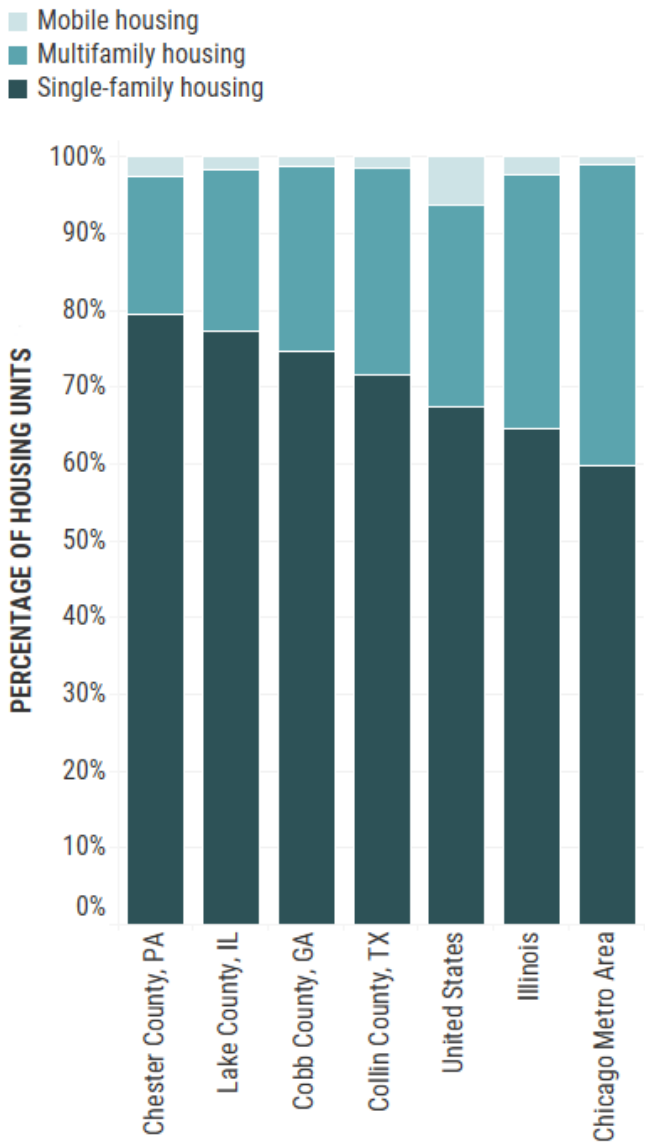
[8] *Lake County 2040 Transportation Plan*, https://www.lakecountyil.gov/DocumentCenter/View/29522/Transit_2040-Transportation-Plan-PDF.

[9] *Lake County Strategic Plan: Investing in People and Our Communities*, 2019, https://www.lakecountyil.gov/DocumentCenter/View/30318/Lake-County-Strategic-Plan-2019.

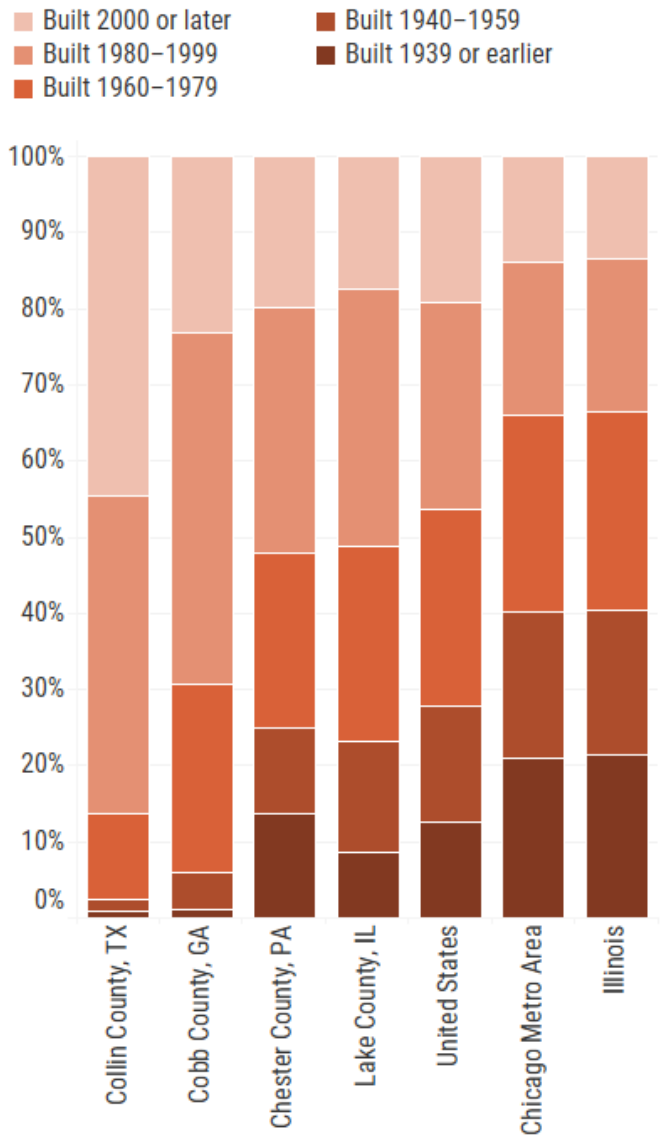
Quintessential America. Lake County's demographic profile closely matches that of the United States—with a nearly identical age structure and racial and ethnic composition. The same is true of the housing stock, which parallels the American postwar growth trajectory. Like the US overall, roughly half of the County's housing units have been added in the past four decades.

FIGURE 4. HOUSING STOCK, 2019

SHARE OF HOUSING STOCK BY TYPE OF STRUCTURE



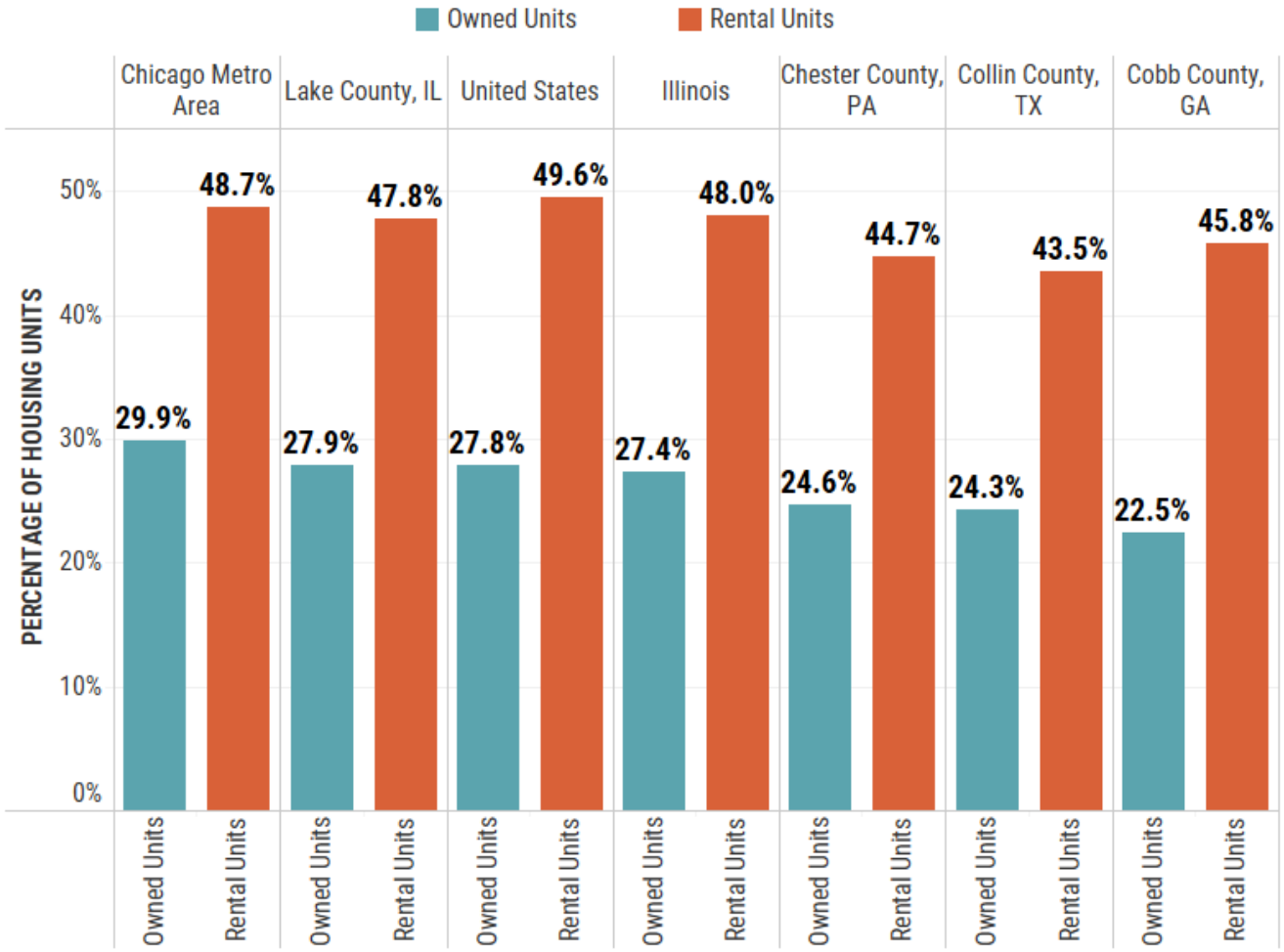
SHARE OF HOUSING STOCK BY AGE OF STRUCTURE



Sources: American Community Survey, 2019 five-year sample; TIP Strategies, Inc.
Note: For legibility, the number of peer benchmark comparisons was reduced in this document. The interactive Tableau file provided separately contains data for all nine benchmark counties shown in Figure 3, page 6.

Household Stability. Of all the County's housing units, 68 percent are occupied by their owners compared to just 56 percent nationally. Those occupants are more likely to be partnered households (64 percent in Lake County versus 55 percent nationally) and more likely to have a four-year degree (45 percent in Lake County versus 32 percent in the US overall). Unsurprisingly, this combination of coupled households and high education boosts earning power. Lake County's median household income exceeds the US average by 42 percent ($89,400 versus $62,800). Lake County's median home price also exceeds the US median, but by a much lower 22 percent. Housing affordability might elude the peer benchmark counties of the East and West Coasts, but for Lake County's affluent residents, affordability lies within reach. However, despite this relative affordability, nearly half (47.8 percent) of renter-occupied units are spending more than 30 percent of their income on housing expenses. When compared to owner-occupied units, this falls to only 28 percent (27.9 percent) of occupants, again drawing attention to income disparities across the County.

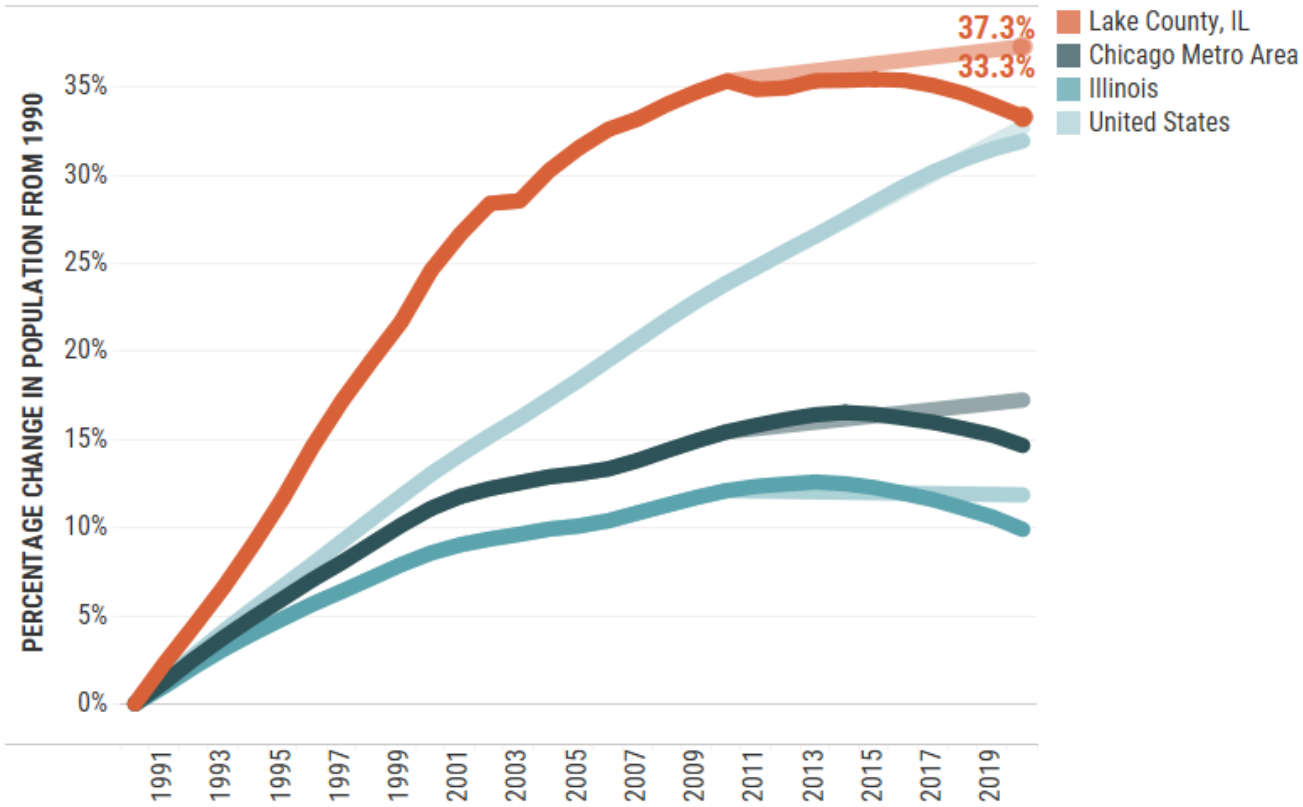
FIGURE 5. HOUSING AFFORDABILITY, 2019
SHARE OF HOUSING UNITS WHOSE OCCUPANTS SPEND MORE THAN 30 PERCENT OF HOUSEHOLD INCOME ON HOUSING EXPENSES (I.E., RENT OR MORTGAGE PAYMENTS)



Sources: American Community Survey, 2019 five-year sample; TIP Strategies, Inc.
Note: For legibility, the number of peer benchmark comparisons was reduced in this document. The interactive Tableau file provided separately contains data for all nine benchmark counties shown in Figure 3, page 6.

Flatlining Population Growth. While US population growth has slowed, Lake County's population has seen virtually no increase (see note below Figure 6). Population estimations for 2020 suggest that Lake County's natural increase in population—the excess of birth certificates over death certificates—was less than a quarter of its 2001 peak. Domestic outmigration tipped from positive to negative in 2003. Since the Great Recession (2007–2009), Lake County's overall population has barely budged, increasing only by 1.5 percent since the last US Census compared to a 7 percent national growth rate. While economic prosperity can continue with a declining population (as in wealthy tourist communities), it more often results in declining living standards and disinvestment.

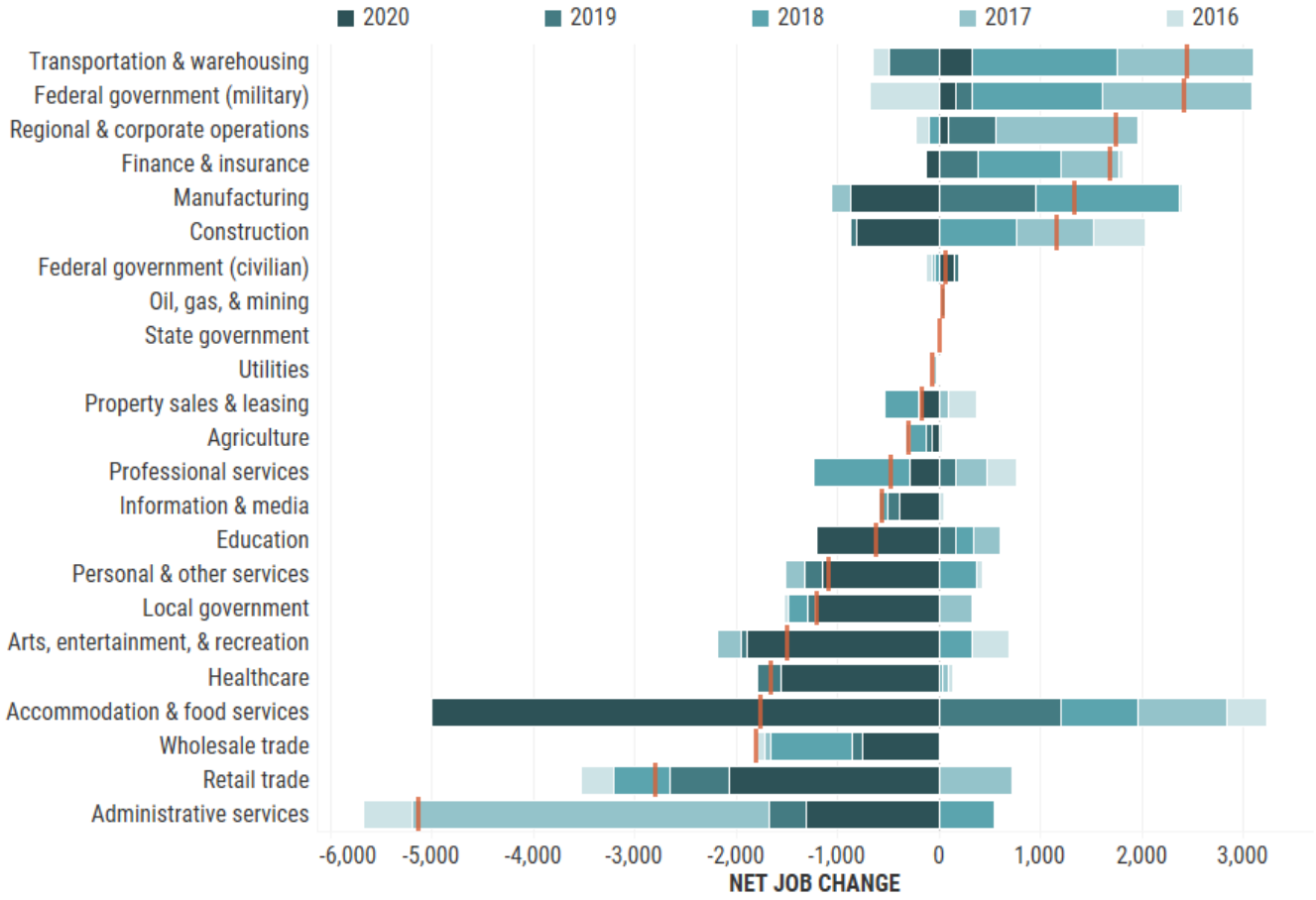
FIGURE 6. POPULATION TREND COMPARISONS
POPULATION ESTIMATES (DARKER LINES) COMPARED WITH 2020 US CENSUS REDISTRICTING POPULATION COUNTS (LIGHTER LINES)



Sources: US Census Bureau, Population Estimates Program and 2020 US Census Redistricting; Moody's Analytics; TIP Strategies, Inc.
Note: Population estimates prior to 2010 are sourced from Moody's Analytics. Estimates from 2010 to 2020 are sourced from the US Census Bureau Population Estimates Program, which is based on the 2010 US Census and data on births, deaths, and migration. Linear trends between the 2010 population estimates and the 2020 redistricting population counts are plotted in light colors corresponding to geography. The US Census Bureau will adjust population estimates 2010 to 2020 in the spring of 2022 to be consistent with the new population counts.

Hidden Employment Trends. Over the past two decades, Lake County's employment trends have been less volatile than some of the peer counties analyzed. Although its growth might have been slower, with lower peaks and less dramatic downturns, this pacing has largely worked to the County's advantage. Underlying this relative stability are several noteworthy sectoral trends that might be lost in the numbers. First, the manufacturing sector[10] is Lake County's largest employer, and that job base has been remarkably stable over the past two decades, even as US manufacturing suffered through multiple shocks. Second, US employment in the transportation and warehousing sector has boomed since the Great Recession, but growth in Lake County in the past five years has outperformed even the national trend. Third, regional and corporate operations have experienced impressive growth in Lake County. Fourth, the military's prominence as a leading employer in the County has waned in the past 20 years, with noncivilian US Department of Defense employment down by nearly 40 percent since 2001. Finally, Lake County has experienced unusually lackluster growth in professional services firms. This sector is of particular importance to this plan. Professional services are a good fit for affluent suburban counties, as evidenced by many of Lake County's benchmark peers. These firms also bring in their wake a more dynamic economy with significant technology spin-off opportunities.

FIGURE 7. NET EMPLOYMENT CHANGE FOR SELECTED PERIOD BY SECTOR: LAKE COUNTY, 2016–2020



Sources: US Bureau of Labor Statistics (BLS); Economic Modeling Specialists International (Emsi) 2021.2—Quarterly Census of Employment and Wages (QCEW) Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.
Note: **Red bars** indicate the total net change for the period.

[10] The manufacturing sector is based on broad two-digit North American Industry Classification System (NAICS) codes. Within the sector there are many types of job roles, or occupations, including production, management, and business operation roles, each with their own unique employment trends.

STRATEGIC GROWTH AREAS

Lake County has a diverse and dynamic economy with strong industry clusters spanning from life sciences to manufacturing to high tech industries. Support for these clusters is coordinated across multiple channels throughout the greater Chicago area, including higher education and workforce development partners. Lake County businesses contribute significantly to the metropolitan area economy, forming a vital part of the supply chain and traded sector ecosystem. While many of the County's industries have manufacturing legacies, varying levels of production activities actually occur in the region. As part of the development of the CEDS, a more granular analysis of the region's clusters was conducted, with a focus on identifying strategic growth areas.

Strategic growth areas consider traditional clusters that can be defined using the existing industry classification systems, as well as activities and technologies that do not align neatly with these structures. This more flexible terminology enables targeting efforts to encompass strategic projects that can support multiple areas of activity and enhance innovation and entrepreneurship. Four strategic growth areas were identified: the medical supply chain, financial and benefit services, technology and professional services, and industrial and consumer supplies. Data profiles for each area, including employment trends and staffing patterns, can be found in Appendix C.

The presence of industry leaders such as Abbott, AbbVie, and Horizon Therapeutics provides Lake County a strategic advantage within the greater Chicagoland regional life sciences and biotechnology cluster. Industries encompassed by this strategic growth area include biopharmaceutical products, surgical and dental instruments and supplies, and wholesaling of drugs and druggists' sundries. Nationally, employment in this sector is expected to grow by 5 percent over the next four years (2020 to 2025), while employment in Lake County is predicted to decline by 1.5 percent (see Figure 23). Lake County has seen an overall employment increase in this sector since 2010, despite modest declines between 2011 and 2012 and later between 2016 and 2017. This pattern also suggests that employment changes in this sector are cyclical. Even with this fluctuation, employment in the medical supply chain sector in Lake County is still well above average, with a location quotient (LQ) of 14.09 in 2020 (relative to the US average LQ of 1.00). See text box on page 26 for a definition of location quotients. Given Lake County's strengths in life sciences and the national increase in employment, a proactive approach to workforce development might reverse this projected employment decline.

Lake County has an established corporate headquarters and business operations cluster, with activities crosscutting multiple sectors from pharmaceuticals to financial services. Within this cluster, there are two niche growth areas identified as potential opportunities for Lake County: (1) financial and benefit services; and (2) technology and professional services. Employment in financial and benefit services-based businesses in Lake County grew over 17 percent from 2010 to 2020, with an additional 5 percent job growth anticipated through 2025. Nationally, this sector is projected to increase by just over 3 percent from 2020 to 2025. The technology and professional services sector also saw significant employment gains, expanding by more than 24 percent between 2010 and 2020. Although employment in Lake County is only expected to grow about an additional 3 percent (2.9 percent) from 2020 to 2025, nationally this sector is expected to grow nearly 10 percent during that time period. Considering the ubiquitous supply chain challenges disrupting business operations during the pandemic, Lake County leaders can bolster and diversify within this industry to build resiliency and aid in economic recovery.

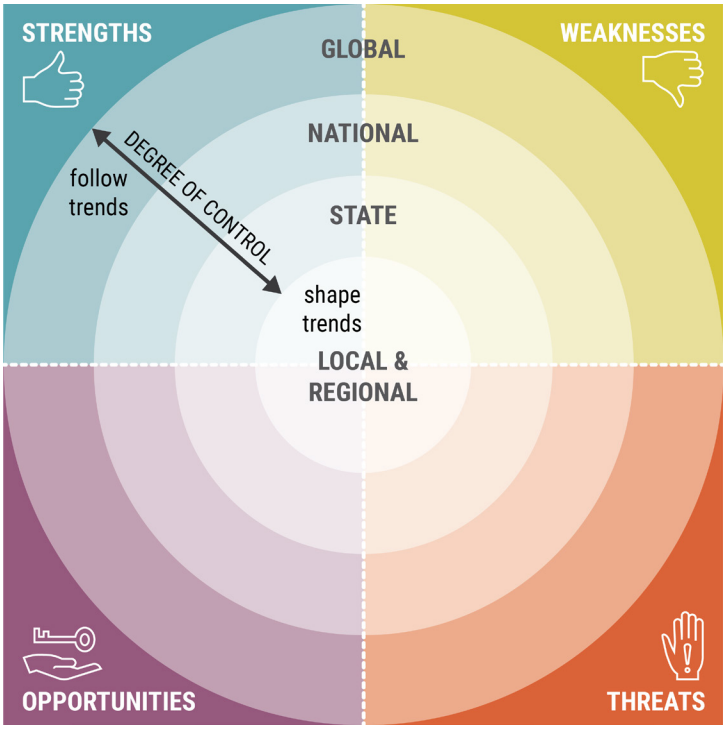
The fourth strategic growth area for Lake County, industrial and consumer supplies, builds on the region's strengths in the manufacturing and machining sector. Similar to the employment gains seen in activities related to corporate operations, industrial and consumer supplies saw employment growth of over 27 percent from 2010 to 2020. Lake County's job growth in this sector is also expected to more than double the pace of national growth—5.4 percent for Lake County versus only 2.2 percent for the US. Lake County's LQ trend line for industrial and consumer supplies is also expected to continue to rise, from 3.41 in 2020 to 3.84 in 2025.

The CEDS recognizes the role established and emerging industry clusters play in ensuring economic resiliency. By continuing to invest in workforce development, as well as business development and recruitment, Lake County can continue to grow and diversify its economy.

SWOT ANALYSIS

An analysis of Lake County's strengths, weaknesses, opportunities, and threats (SWOT analysis) was informed by findings from the data analysis and insights gained from stakeholder engagement. The resulting analysis identifies internal and external factors that influence the County's competitive position. Findings from the analysis were mapped in a manner that gives a visual representation of the degree of control to which the region can address the issues. Because the SWOT analysis answers the question of where the region currently is, this tool can also be used to measure progress over the course of the Strategic Action Plan's implementation.

FIGURE 8. SWOT ANALYSIS OVERVIEW DIAGRAM
SEE APPENDIX B FOR DETAILED DIAGRAMS.



The SWOT analysis revealed and confirmed various findings, which are detailed in Appendix B. Each recommendation outlined in the Strategic Action Plan (beginning on page 13) is informed by one of these strengths, weaknesses, opportunities, or threats. While the SWOT analysis includes factors ranging from a local level to a global level, Lake County's degree of control is most concentrated at the local and regional level. Therefore, the recommendations most critical for this CEDS process are at the local and regional levels. The SWOT analysis, and the related strategies and actions, considers Lake County's cultural, economic, technological, intellectual, and physical assets and deficiencies. They help connect the dots between the questions: Where is Lake County now? Where does it want to go? How will it get there? For example, while Lake County has strengths in education and workforce, such as quality school systems, a skilled workforce, and high educational attainment, these strengths are not consistent across municipalities. Educational attainment varies greatly between different communities and there is generally a lack of engagement between area employers and educational institutions. Informed by this finding from the SWOT analysis, the CEDS Committee identified several opportunities for increasing inclusive and equitable growth initiatives through greater collaboration in workforce development efforts, creation of more work-based learning opportunities, and the development of more childcare offerings.

STRATEGIC ACTION PLAN

Over the past decade, the practice of economic development has extended beyond traditional business development and recruitment to embrace multiple factors that contribute to a more holistic approach. Community leaders must also embrace this inclusive approach, which places a greater emphasis on resiliency and sustainability. The Strategic Action Plan identifies the role the Lake County economic development community can serve by convening traditional and nontraditional partners to address the community's weaknesses and threats and capitalize on its strengths and opportunities. The plan also leverages and integrates economic and community development work already underway by partners throughout Lake County. This approach allows for greater engagement with partners to coordinate—and not duplicate—economic development work across the region for a broader and more equitable impact.

The Strategic Action Plan is organized around three goals, with numerous strategies cutting across all three areas. The first goal, Competitive Positioning, focuses on the decisions Lake County leaders will need to address collectively to build regional solutions that ensure the County is positioned or aligned to capitalize on opportunities. The second goal, Transformational Development, focuses on the physical environment and the need for intentional development to drive growth. The final goal, Community Engagement, focuses on strategies to maintain, as well as enhance, the County's high quality of life to ensure the region is a desirable place for investment.

GOAL 1. COMPETITIVE POSITIONING

This goal seeks to elevate Lake County in the mind of investors by tackling the region's challenges and leveraging its opportunities. Strategies included in this section range from workforce development to innovation and address the broad-based factors that impact regional growth while leveraging Lake County's unique strengths and assets.

STRATEGIES AND ACTIONS

1.1. Form a competitiveness task force comprised of public and private sector members.

1.1.1. Take steps to address regional issues identified in answer to pressing questions facing the future of Lake County (see Action 3.2.1).

DETAILS

- How will the region approach growth?
- What does the region need to do to ensure a highly skilled workforce?
- Are Lake County communities adopting policies to support diversity, equity, and inclusion?
- Is Lake County adequately prepared for a changing climate and taking appropriate resiliency measures?

1.1.2. Develop, refine, and monitor community indicator metrics and benchmark these to peer and aspirational communities (see Appendix A).

1.2. Increase diversity within the region's target and legacy industry sectors by addressing barriers and focusing on targeted workforce development (see Strategy 3.3).

1.2.1. Track metrics related to diversity by employment sectors and disaggregate data whenever available to understand trends.

1.2.2. Identify barriers that make it challenging for underrepresented populations to access high paying jobs in Lake County's target sectors.

1.2.3. Support the creation of targeted training programs that meet the needs of employers and students.

- Focus on training programs designed to grow the region's target sectors.
- Ensure programs are designed with student needs in mind, including understanding and alleviating barriers that inhibit completion.

1.2.4. Emphasize support for programs that increase college enrollment rates among high school graduates from underrepresented backgrounds.

1.3. Promote the region's high quality of life for talent attraction and retention through marketing and network building.

1.3.1. Strengthen Lake County's social media and web presence around quality-of-life promotion to attract new talent.

- Review existing content to identify opportunities to strengthen, enhance, and refine messaging and update regularly.
- Include websites such as Wikipedia and other information-sharing platforms in addition to traditional social media networks like Facebook and Instagram.

1.3.2. Leverage tourism and destination marketing for talent attraction efforts and widely share resources with public and private sector partners.

1.3.3. Inventory existing regional talent attraction and retention strategies to identify gaps, as well as strengthen and align programs.

1.4. Reinforce relationships between the private sector and education and training organizations to ensure strong communication on talent needs and to develop clear career pathways (see Action 3.3.2).

1.4.1. Regularly convene workforce development and private sector partners to understand employer needs, training opportunities, and available grant/resource programs.

1.4.2. Strengthen the skilled talent pipeline with support and investments in upskilling and cross-training workers by leveraging the region's education and training assets.

1.4.3. Continue to support and expand access to bachelor's and master's degree programs in Lake County, both physical as well as virtual.

1.5. Strengthen existing business growth and retention programs, as well as bolster business recruitment efforts, to build economic resiliency and foster innovation.

1.5.1. Prioritize traded sector and businesses in the region's strategic growth areas for business support.

- Catalog corporate sustainability initiatives across Lake County, such as LEED/Green Globes building certifications and Certified B Corporations.
- Work with Lake County's sustainability staff to engage the business community to discuss existing practices for increasing environmental sustainability, identify best practices, and explore collaborative approaches for expanding these practices across industries and sectors.

1.5.2. Use the strategic growth sector analysis to strengthen Lake County's target clusters and workforce that supports these industries.

- Use the US Cluster Mapping tool and data from the Brookings Institution to deepen knowledge on cluster formation. Industry publications, including those from leading consulting firms like Bain & Company Industry Insights and Deloitte Industry Outlooks, offer insight into industry trends.
- Focus on industry clusters in emerging and high-growth industries, such as clean tech and green energy.

1.5.3. Ensure underrepresented businesses have the resources to seek and apply for government contracts.

1.6. Increase collaboration between entrepreneurs and the private sector to spur innovation through mechanisms such as mentorship programs, reverse-pitch competitions, and access to funding opportunities.

1.6.1. Map the entrepreneurial ecosystem and resources in Lake County to identify gaps and fortify the system.

1.6.2. Enhance entrepreneurial support in under-resourced communities throughout Lake County.

1.6.3. Deepen partnerships between entrepreneurial support systems and Lake County's school districts to ensure students receive business education and mentorship.

- Expand startup education programs to include all middle and high schools in Lake County.

GOAL 2. TRANSFORMATIONAL DEVELOPMENT

Transformational development strategies focus on the built environment, from site development to infrastructure. To ensure growth occurs in a responsible, managed, and equitable way across Lake County, leaders will need to be proactive and thoughtful about commercial, industrial, and residential development. Although this idea often defers to a market-driven approach guided by the County's comprehensive plan, economic development leaders should serve as conveners to accelerate the development that will lead to good paying jobs in sustainable and resilient industries. Development should also be designed and built with environmental resiliency in mind, including green building practices, preservation of natural spaces and biodiversity, and clean energy generation.

STRATEGIES AND ACTIONS

2.1. Support and preserve the development of commercial and industrial employment centers.

2.1.1. Create a public-private committee dedicated to employment site readiness.

2.1.2. Charge the committee with maintaining a site and infrastructure inventory, identifying opportunities to streamline permitting processes, and addressing policy issues.

- Identify publicly owned land for land banking and large site preservation, specifically for employment centers, with a focus on equitable development.
- Include sites for clean power generation, such as solar farms, in the inventory.

2.1.3. Prepare a request for information (RFI) for prominent sites in Lake County to generate redevelopment site plan opportunities.

- Invite leading architectural and design firms to present site concepts to Lake County leadership.

DETAILS

In 2018, Broward County, Florida, released a request for proposals (RFP) for a master plan to redevelop county-owned land adjacent to the FLA Live Arena (previously the BB&T Center). The county sought proposals with a balance of commercial, residential, retail, and experiential developments for the 140-acre site, anchored by the arena. Twelve firms responded, with CallisonRTKL ultimately selected to enter into a public-private partnership with the county. See the successful bid tabulation packet and the CallisonRTKL press release for more information.

2.2. Target brownfield and greyfield remediation and redevelopment to maximize the impact of existing funding opportunities, focusing on underinvested communities.

2.2.1. Support grant applications and funding requests for brownfield grants for site remediation.

2.2.2. Focus on sustainable infrastructure and technology deployment to ensure resilient development practices (see Action 2.3.4).

2.2.3. Denote brownfield and greyfield sites, including infill opportunities, in the site inventory and prioritize development opportunities.

2.3. Structure conversations around infrastructure and regional mobility from an innovation perspective.

2.3.1. Explore "smart" county initiatives[11] focused on connectivity to job employment centers, including a discussion of smart growth principles[12] (see Action 3.5.2).

2.3.2. Adopt dig once policies that align infrastructure developments into one project.

2.3.3. Work with relevant utilities and agencies to harden infrastructure systems that are prone to disruption from environmental impacts. Examples include working with existing electric utilities to address barriers to burying power lines, such as cost and right-of-way acquisition.

2.3.4. Identify sustainable infrastructure and development practices that build resiliency in Lake County and invest in systems, such as stormwater and sewer, that preserve the natural environment (see Action 2.2.2).

- Align investments with the *Lake County Regional Framework Plan*, and CMAP's comprehensive plan (*On To 2050*), as well as municipal comprehensive plans and capital improvement plans.

2.3.5. Support projects that bolster business growth and development in Lake County, such as the Waukegan National Airport Safety Improvement Project.

2.3.6. Leverage the region's multimodal transit system, including first/last mile connections, to get workers to employment centers in coordination with regional transportation plans.[13]

2.3.7. Optimize the region's multimodal transportation network, including roadway, rail, water, and aviation, to increase the mobility of people and goods.

2.4. Prioritize investments in downtowns and waterfront developments that enhance vibrancy and support business growth, especially in underinvested communities.

2.4.1. Activate public spaces and provide equitable access to amenities, including parklets and public art installments, to enhance communities throughout Lake County (see Action 3.5.3).

2.4.2. Promote downtown development projects that enhance business growth, including storefront revitalization (see Action 3.5.3) and small business broadband access (see Strategy 3.2).

2.5. Engage Naval Station Great Lakes (NSGL) and the Captain James A. Lovell Federal Health Care Center (locally known as the VA hospital) in regional economic development initiatives that leverage Lake County's innovation assets (see RFI example in Action 2.1.3).

---

[11] Hernon, M. American City and County, Building smart cities and counties with the infrastructure act, 28 January 2022, https://www.americancityandcounty.com/2022/01/28/building-smart-cities-and-counties-with-the-infrastructure-act/

[12] For a discussion of smart growth principles, see *Interconnections: Lake County Regional Framework*, "Growing Smarter", page 14, June 2005, https://www.lakecountyil.gov/DocumentCenter/View/2453/Interconnections-PDF?bidId=. These principles are integrated throughout the plan, which was last revised and adopted in October 2014.

[13] e.g., *Lake County 2040 Transportation Plan*, Metra strategic plan, PACE Suburban Bus strategic plan.

2.5.1. Explore adding board or committee member positions for NSGL representatives for workforce and economic development organizations.



BEST PRACTICE

Greater Omaha Chamber & Offutt AFB

LOCATION: Nebraska
INFO: www.omahachamber.org/pdf/Offutt-AFB.pdf

The Greater Omaha region has developed its military and defense cluster around Offutt Air Force Base, one of the largest employers in the region. In addition to over 65 cutting-edge defense and security companies that directly support Offutt operations and missions, the region is also home to the Peter Kiewit Institute (PKI), which supports high tech workforce development and innovation. PKI is part of the University of Nebraska and was developed in 1996 with the mission to fill the rapidly increasing number of vacant jobs in the technology sector. PKI deploys innovation learning models concentrated on work-based learning to ensure students are ready for work upon graduation. A hallmark of PKI is its certification by the US National Security Agency (NSA), which attracts defense industry projects from across the country, in addition to access to one of the world's fastest supercomputers. These operations are also supported by world class telecommunications and transportation infrastructure in the Greater Omaha region. Leaders from Offutt are directly engaged in economic and workforce development efforts and benefit from a symbiotic relationship with the region.

GOAL 3. COMMUNITY ENGAGEMENT

The concept of quality of place is outward looking. It contrasts with the more traditional notion of quality of life. The latter seeks to build on the things important to current residents, while quality of place also focuses on the perspective of the nonresidents. This approach places greater emphasis on the area's appeal to a broader audience, specifically concerns related to housing, education, broadband, and equitable growth. Finally, understanding what amenities citizens want and how differently people live will lead to a more diverse and inclusive community.

STRATEGIES AND ACTIONS

3.1. Increase the number of housing units (owner occupied and rental) across the spectrum of affordability and density.

3.1.1. Assemble a housing coalition of public and private sector partners to understand Lake County's current housing inventory and plan for growth goals (see Action 1.1.1).

3.1.2. Ensure connectivity of new and existing housing units to job centers and transportation networks, including nonmotorized routes (see Action 3.5.2).

3.1.3. Preserve existing housing stock through programming such as home repair grants and support pathways to homeownership through down payment assistance and first-time home buyer financial education.

3.2. Leverage federal infrastructure investments to expand broadband infrastructure in Lake County (see Strategy 2.3) and address barriers to internet access, such as digital literacy, access to devices, and affordability.

3.2.1. Identify opportunities to scale existing broadband efforts already underway to include all of Lake County. Ensure small businesses have access to broadband to support business growth, as well as support for tech training (see Action 3.5.3).

3.2.2. Engage nontraditional economic development partners, in conjunction with workforce development and education partners, to launch digital literacy initiatives and improve access to broadband-ready devices.

3.3. Build awareness of career opportunities in the region, especially in science, technology, engineering, and mathematics (STEM) occupations and the trades, beginning in middle school through adulthood. Ensure a focus on historically underserved communities (see Strategy 1.2).

3.3.1. Launch and expand consistent career exploration programs across public schools that intentionally expose all students to career opportunities.



BEST PRACTICE

Careers in Gears

LOCATION: Southern Oregon
INFO: worksourcerogue.org/youth-opportunities/careers-in-gear/

In 2010, the Southern Oregon region realized it was facing a shortage of workers in the manufacturing sector and waning interest from young adults in pursuing careers in manufacturing. Workforce development and private sector leadership recognized that perception was one of the more commonly cited reasons why students were not pursuing manufacturing opportunities and set out to develop programs to expose youth to career paths in the sector. Careers in Gears started as a job fair that has nearly quadrupled in size from its initial debut and has expanded to include industry tours and mentorship opportunities for students. The success of Careers in Gears can be attributed to the regional partnership among economic development, workforce development, community nonprofits, the private sector, and the Medford school district, who work together to build awareness of the program and support its continued success.

3.3.2. Deepen relationships between economic development, workforce development, school districts, and the private sector to facilitate career awareness, engaging with all public-school levels and leveraging the public library's partnerships (see Strategy 1.4).

3.3.3. Grow learning opportunities, such as paid internships, apprenticeship programs, and short-term job shadowing, to raise awareness of the region's career pathways, especially among young students and those in underserved communities (see Action 3.4.4).

3.3.4. Coordinate with local employers to support and expand career-ready certificate and two-year degree programs that prepare the Lake County workforce for good paying jobs in in-demand occupations (closely aligned with Action 1.2.3).

3.4. Convene public and private partners around early childhood education issues, including infant care, to address barriers facing providers and families.

3.4.1. Create a public-private task force that meets regularly to understand and address early education barriers and regional solutions.

3.4.2. Launch a needs and feasibility study to understand childcare needs in Lake County. Ensure both public and private sector leaders are engaged in the process, as well as underserved communities.

3.4.3. Explore grant and funding opportunities for childcare facility development and expansion and ensure such opportunities are also available to home-based childcare programming.

3.4.4. Advance internship opportunities in childcare for those students interested in pursuing careers in early childhood education (see Action 3.3.3).



BEST PRACTICE

Southwest Washington Child Care Consortium

LOCATION: Washington State
INFO: www.esd112.org/swccc

The Southwest Washington Child Care Consortium (SWCCC) is a public-private partnership and the largest community-run childcare system in the US, operating 40 centers between two counties and serving over 2,200 children annually. SWCCC was started in 1989 when business, education, and civic leaders came together to address the growing need in the community for high quality, affordable childcare in the region. When the program began, all SWCCC facilities were built on-site at private companies and were operated by the school district. Although facilities were open to the public (space permitting), companies often subsidized employees' costs for childcare. Today, in addition to the on-site facilities, SWCCC also operates community-based centers and offers before- and after-school care at public elementary schools.

3.5. Make quality-of-life investments that will support tourism recovery and growth in Lake County and positively impact both residents and visitors.

3.5.1. Increase public access to natural resources and green spaces, including waterfronts and the forest preserve.

- Expand trails and amenities for residents and visitors.

3.5.2. Connect trail systems to key thoroughfares to create viable commuter routes from residential areas to employment centers (see Strategy 2.3).

3.5.3. Promote and expand downtown development efforts, as well as restoration projects that revitalize main street storefronts (see Actions 2.4.1 and 2.4.2).

3.5.4. Grow the region's agritourism industry and promote the region's unique culinary experiences. Expand farm-to-table offerings and partnerships among producers (farms) and makers (chefs/artisans).

3.5.5. Support efforts to develop a regional plan to restore and protect the Fox River waterway and Chain of Lakes. Such a plan will help ensure that their ecological, cultural, and economic value is maintained.

APPENDIX A. EVALUATION FRAMEWORK

Metrics to track plan implementation are a vital component of the CEDS. An evaluation framework should include both broad indicators of community health, as well as unique metrics that correlate back to the CEDS goals.

The community indicator metrics, or baseline CEDS performance metrics, include publicly available data sources at the national level, which allow for longitudinal tracking and comparison to peer and aspirational communities. Many of these indicators, including data for benchmark communities, are included in the *Lake County Economic Explorer,* a customized, interactive data visualization delivered separately. These metrics, described in Figure 9, serve as a baseline for Lake County to evaluate its competitive position. Where possible, all indicators should be disaggregated by gender and race/ethnicity.

Along with these broad measures, additional metrics should be identified and added throughout the plan's implementation. Examples of these metrics are provided in Figure 10, however, they should be expanded as strategies and actions are deployed. Furthermore, just as the CEDS is designed to be a dynamic and evergreen plan, evaluation metrics are also adaptable to changing conditions. Because the CEDS is a five-year plan, not every metric needs to be tracked at project onset, and some measures might require additional resources to track.

This evaluation framework allows for transparent communication on progress toward plan implementation, as well as determines if the strategies are meeting the defined objectives of the CEDS.

FIGURE 9. BASELINE CEDS PERFORMANCE METRICS
INDICATORS OF GENERAL COMMUNITY HEALTH AND PROGRESS

TOPIC	EXAMPLES
Demographics	Population trends, age structure, veteran status
Socioeconomics	Per capita income, median household income, poverty rate, educational attainment
Housing	Home values, mortgage equity, home ownership by race, new housing construction
Workforce	Civilian labor force, unemployment rate, median wage, commuting patterns
Industry	Job growth (all industries), target industries (LQ, firm growth, employment), new business establishments
Other	Air travel trends, lodging data/visitor spending, air/water quality

FIGURE 10. STRATEGIC ACTION METRICS
INDICATORS OF PROGRESS ON CEDS IMPLEMENTATION

GOAL	DESCRIPTION
Goal 1: Competitive Positioning	1. Number of jobs within target and priority industries and the percentage of hires from underrepresented populations. 2. Number of new businesses or expansions within industry clusters.
Goal 2: Transformational Development	1. Number of projects advanced and completed (new sites, brownfield/greyfield sites, site readiness). 2. Amount of private investment made in the County.
Goal 3: Community Engagement	1. Number of new affordable housing units. 2. Number of workers moving to Lake County.

APPENDIX B. SWOT ANALYSIS DIAGRAMS

Additional detail about the diagrams presented in this section is provided on page 12.

FIGURE 11. LAKE COUNTY STRENGTHS AND WEAKNESSES

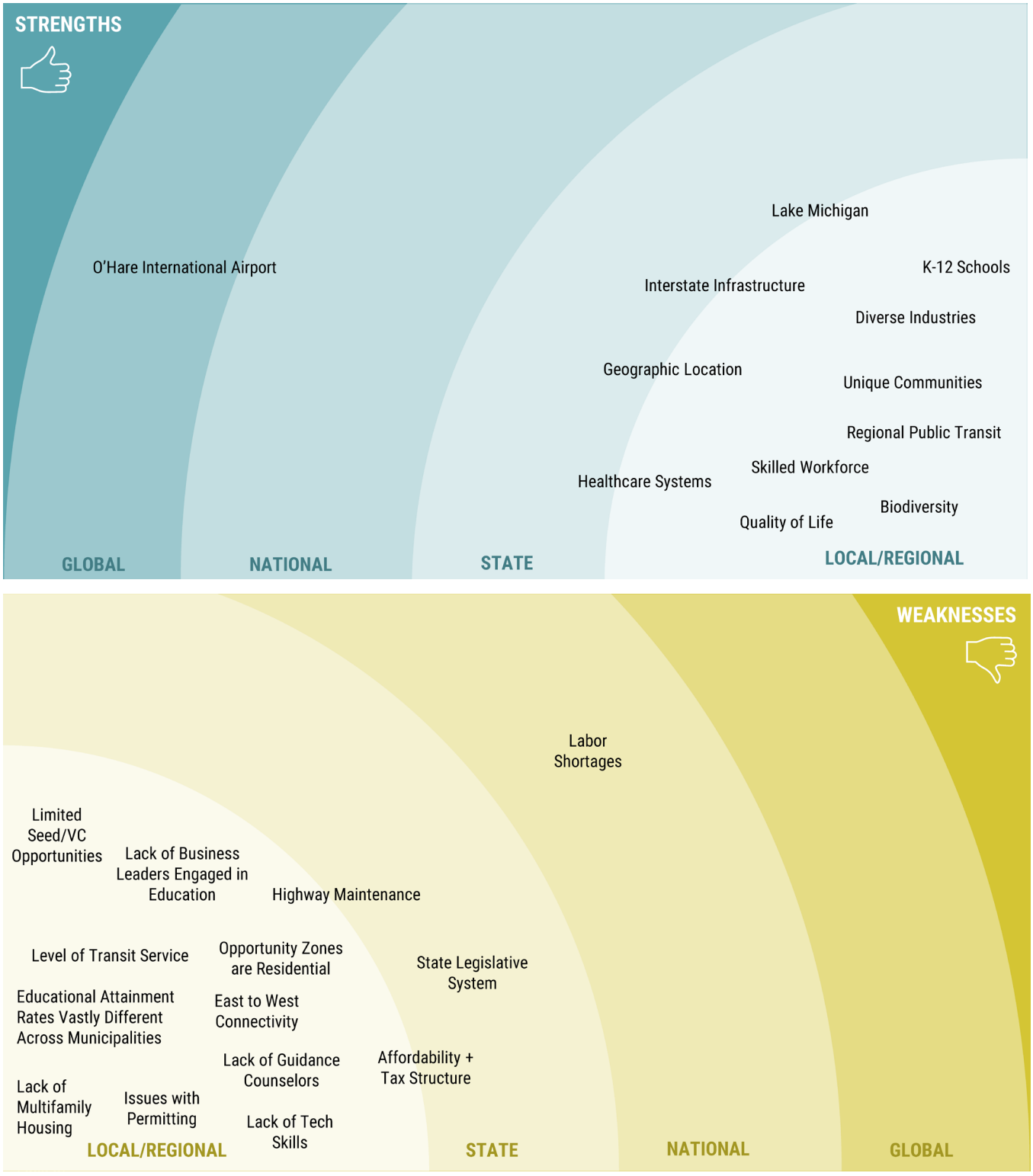
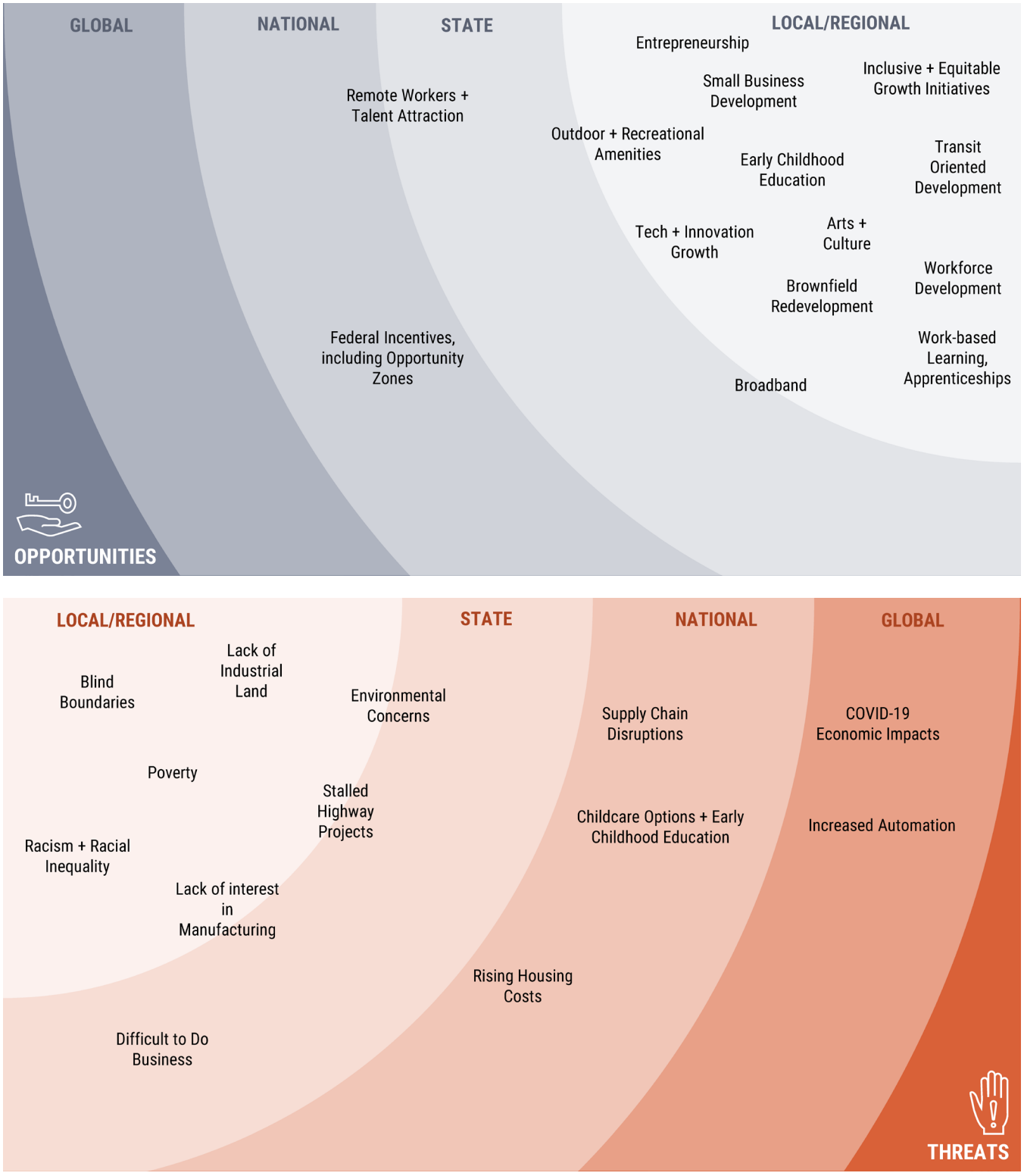


FIGURE 12. LAKE COUNTY OPPORTUNITIES AND THREATS



APPENDIX C. STRATEGIC GROWTH AREAS

INTRODUCTION

Lake County has a broad and diverse economy, which includes high growth industries in multiple clusters. Working from the County's established clusters, reframed to align with the EDA's definitions, four strategic growth areas were identified. All four of these growth areas are entirely comprised of traded sector industries, and three of the four include manufacturing activities to some degree.

- The **Medical Supply Chain** strategic growth area encompasses three subcategories, including biopharmaceutical products, one of the strongest employment clusters analyzed (see Figure 17). The biopharmaceuticals industry comprises 4.3 percent of Lake County's local employment and has an LQ of 22.11. This indicator translates into a concentration of workers more than 22 times the national average.
- **Financial and Benefit Services** is expected to see continued gains, with employment in financial services occupations expanding by nearly 10 percent between 2019 and 2024. Lake County's job base is also highly concentrated in these occupations, with an LQ double the national average (see Figure 17).
- The third strategic growth area, **Technology and Professional Services**, is comprised of five subareas, including corporate headquarters. Employment growth in this component remained strong from 2010 to 2020, a trend that is expected to continue (see Figure 36).
- **Industrial and Consumer Supplies** includes Lake County's largest manufacturing sector (by employment): plastics products. The plastic products industry comprises 2 percent of local employment and has an LQ of 5.02 (see Figure 17). Additional manufacturing sectors, such as process equipment and components are also included in this strategic growth area.

Data profiles for the strategic growth areas (SGA), which include employment trends and staffing patterns, can be found on the following pages.

FIGURE 13. CLUSTER TARGETING APPROACH



In identifying target sectors, our team examined detailed data to identify which industries are well-established in the region, how they performed in recent years, and how they are expected to perform in the near term. For this analysis, we looked at factors including strategic assets, existing initiatives, critical mass, competitive advantage, growth prospects, and cross-sector synergies.

ABOUT THE DATA

For the targeting analysis, TIP filtered standard North American Industry Classification System (NAICS) classifications within an industry "cluster" framework developed by the US Economic Development Administration (EDA) in conjunction with the Institute for Strategy and Competitiveness at Harvard Business School (www.clustermapping.us).

Source: TIP Strategies, Inc.

FIGURE 14. THE SGA PROCESS

Which **STRATEGIC ASSETS** do we have to give us a competitive edge?

What does the **RELATIVE SIZE** of our employment sectors tell us about the local economy?

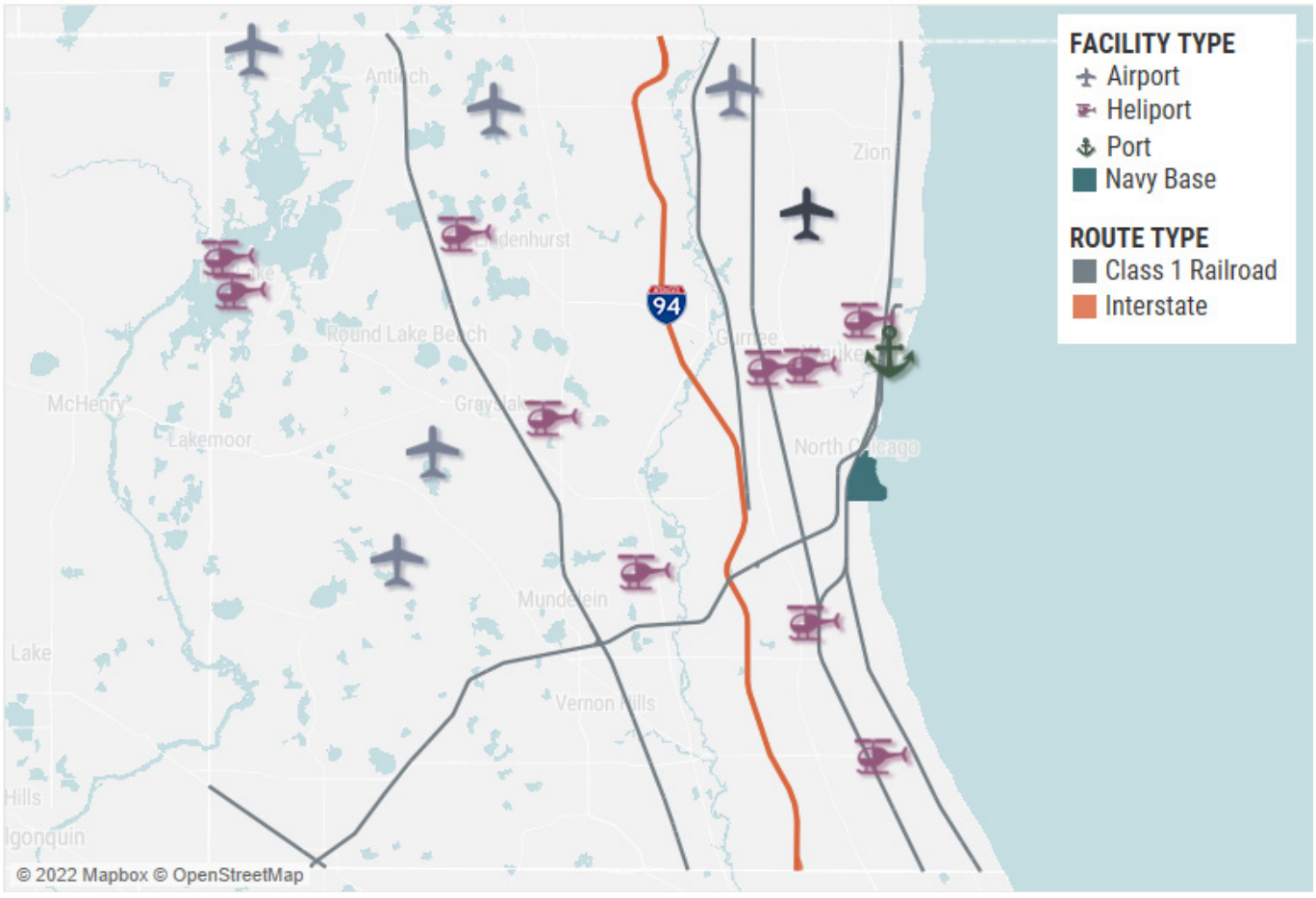
In which sectors can we anticipate the strongest **JOB GROWTH**?

What do we know about local employers' **HIRING NEEDS**?

How does this help us shape and focus our **TARGET FRAMEWORK**?

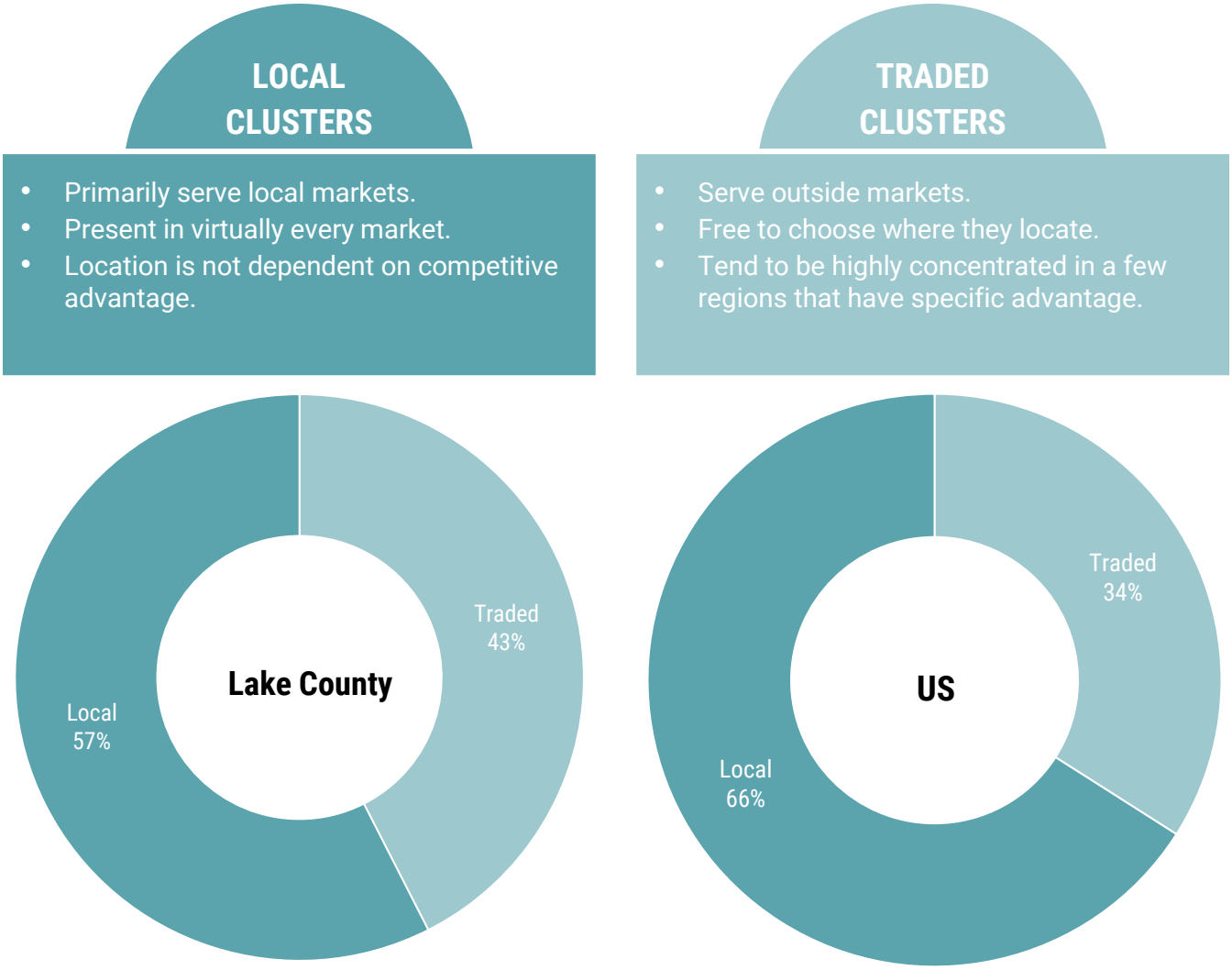


FIGURE 15. STRATEGIC INFRASTRUCTURE ASSETS



Sources: (Figure 14) TIP Strategies, Inc.; (Figure 15) US Bureau of Transportation Statistics National Transportation Atlas Database; TIP Strategies, Inc.

FIGURE 16. EMPLOYMENT CLUSTERS—TRADED VS. LOCAL
EMPLOYMENT IN 2019 BASED ON CLUSTER TYPE



Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

WHY IT MATTERS

Increasing the ratio of traded-to-local clusters is a common strategy for enhancing economic prosperity. Traded clusters are emphasized by economic developers because they include industries and firms that typically produce goods and services for customers beyond the local region. These traded activities are thus more likely to produce externally generated revenues, which can, in turn, help boost local tax coffers. As an example, a dental office might serve local customers exclusively, while a manufacturing plant, a data center, or a hotel would typically serve paying customers beyond the local area. The ability of traded clusters to serve larger markets also presents greater opportunity for employment growth, whereas a dental office might face more finite geographic limits to expansion.

FIGURE 17. EMPLOYMENT CLUSTERS—WEIGHT (SIZE & CONCENTRATION)
TRADED CLUSTERS EMPLOYING THE MOST WORKERS LOCALLY IN 2019

LOCATION QUOTIENTS: **BELOW AVG→** ←**ABOVE AVG**

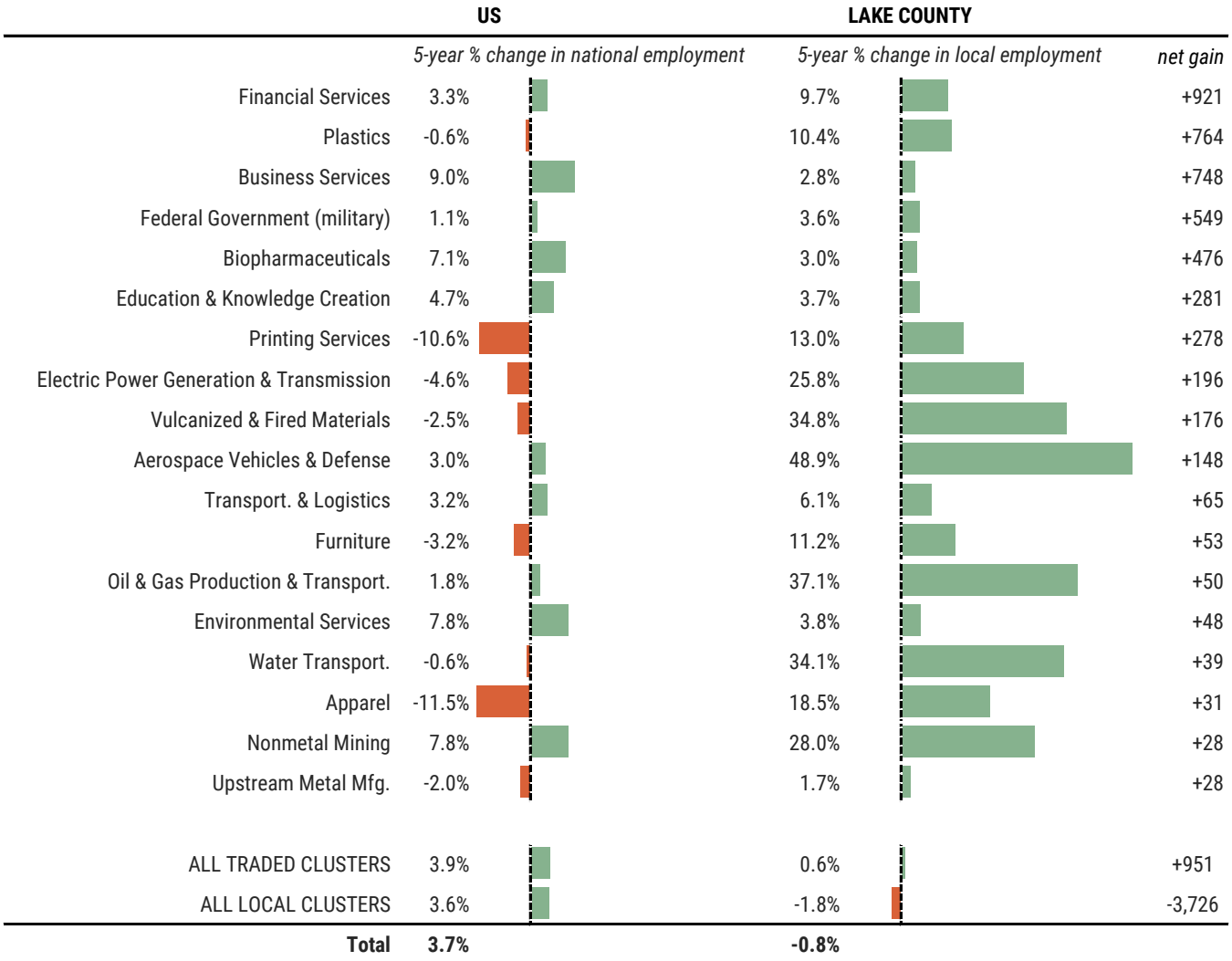
	US	LAKE COUNTY	
	% of national employment	*% of local employment*	*LQ*
Business Services	6.3%	7.4%	1.18
Distribution & E-commerce	3.9%	6.5%	1.69
Biopharmaceuticals	0.2%	4.3%	22.11
Federal Government (military)	1.2%	4.2%	3.42
Financial Services	1.3%	2.6%	2.00
Education & Knowledge Creation	4.2%	2.1%	0.50
Plastics	0.4%	2.0%	5.02
Medical Devices	0.2%	1.4%	7.37
Federal Government (civilian)	1.5%	1.2%	0.81
Hospitality & Tourism	1.7%	1.2%	0.67
IT & Analytical Instruments	0.9%	1.1%	1.23
Prod. Tech. & Heavy Machinery	0.6%	1.0%	1.80
Marketing, Design, & Publishing	1.1%	0.9%	0.81
Insurance Services	1.0%	0.7%	0.72
Printing Services	0.3%	0.6%	2.24
OTHER TRADED CLUSTERS	9.5%	5.4%	
ALL LOCAL CLUSTERS	66.0%	57.5%	
Total	**100.0%**	**100.0%**	

Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi. Totals might not equal 100 percent due to rounding.

WHY IT MATTERS

While local clusters (such as dental offices) typically account for a similar share of employment across communities of varying size, the share of total employment represented by traded clusters (such as automotive assembly plants) might differ dramatically from one community to the next. Traded clusters that account for a larger-than-average share of total employment can suggest areas of competitive advantage. This figure compares the distribution of employment by cluster in the US (first column) with the local area (second column). The third column uses location quotients (LQs) to convey the intensity of employment locally relative to the US. If a traded cluster represents 1 percent of US employment and 5 percent of local employment, its LQ would be 5.0, meaning that the traded cluster in the local area is five times as large as would be expected based on national patterns.

FIGURE 18. EMPLOYMENT CLUSTERS—PROJECTED GROWTH
TRADED CLUSTERS WITH THE HIGHEST PROJECTED LOCAL JOB GAINS, 2019–2024



Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

WHY IT MATTERS

Understanding anticipated job growth in traded clusters is an essential element of the targeting process. This figure compares projected net job gains in percentage terms over a five-year horizon for the US (first column) and the local area (second column). The column on the far right shows projections (in numeric terms) for local net job gains in traded clusters in descending order. The last three rows of the exhibit—showing projected job growth aggregated for traded clusters, local clusters, and total employment—can help inform strategic discussions and refine goals for the future.

FIGURE 19. TALENT DEMAND INDICATORS
ANALYSIS OF UNIQUE LOCAL JOB POSTINGS DURING CALENDAR YEAR 2019

INTENSITY OF JOB POSTINGS RELATIVE TO US: **BELOW AVG** → ← **ABOVE AVG**

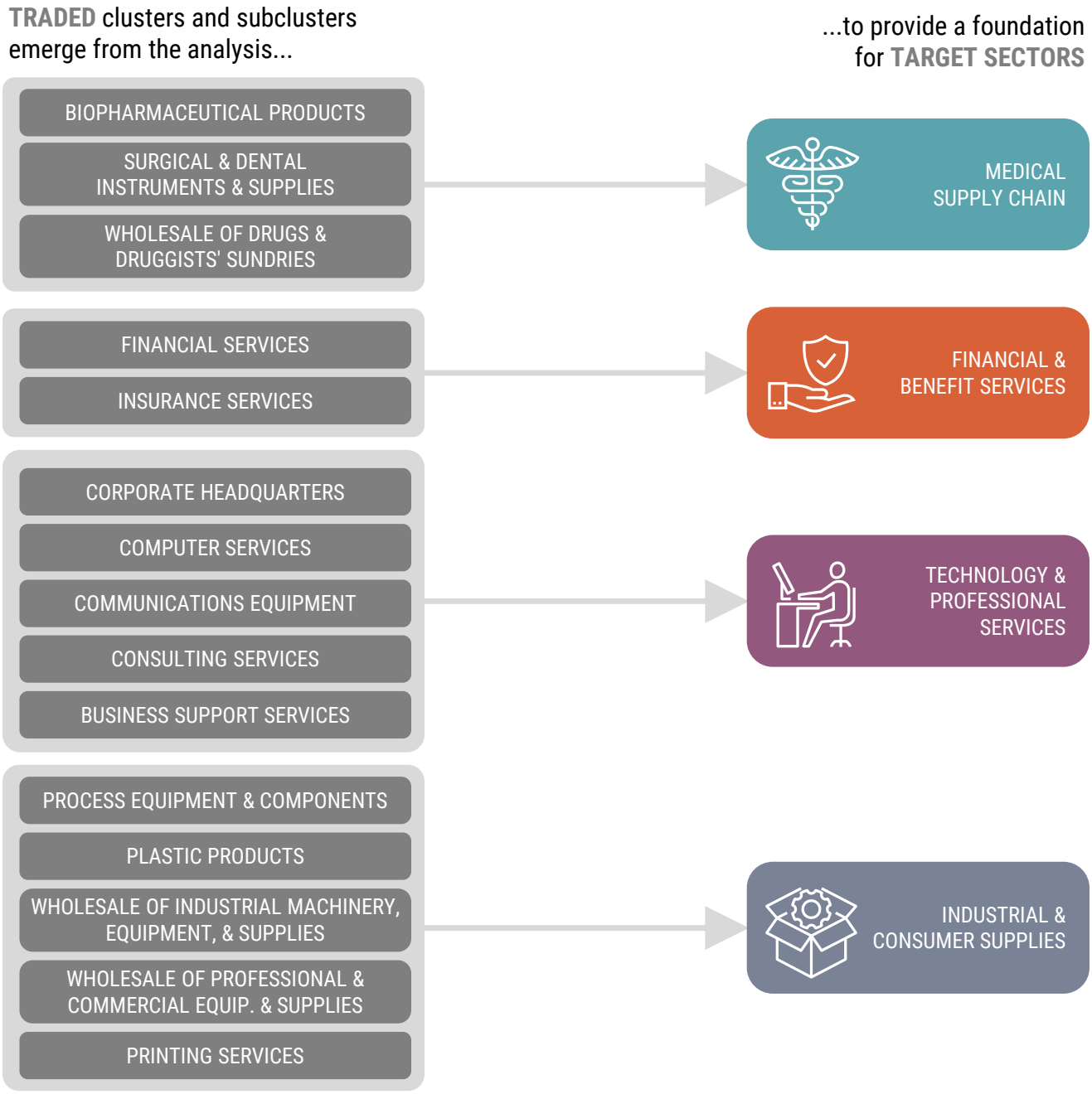
HIGH-DEMAND LOCAL OCCUPATIONS	*location quotient*	HIGH-DEMAND LOCAL SKILLS	*location quotient*
Marketing Managers	2.13	New Product Development	2.12
Personal Service Mgrs.; Entertain. & Recreation Mgrs., Except Gambling; & Mgrs., All Other	2.12	Business Process	2.11
Industrial Engineers	1.81	Project Management	1.92
Computer Systems Analysts	1.69	Strategic Planning	1.88
Computer Occupations, All Other	1.65	Forecasting	1.76
Accountants & Auditors	1.55	Data Analysis	1.68
Management Analysts	1.49	Packaging And Labeling	1.60
Home Health & Personal Care Aides	1.22	Purchasing	1.48
Software Developers & Software Quality Assurance Analysts & Testers	1.15	Computer Science	1.47
Fast Food & Counter Workers	1.07	Agile Methodology	1.37
Stockers & Order Fillers	1.02	SQL (Programming Language)	1.37
General & Operations Managers	1.02	Auditing	1.33
Retail Salespersons	0.98	Automation	1.32
First-Line Supervisors of Office & Administrative Support Workers	0.96	Customer Experience	1.31
First-Line Supervisors of Food Preparation & Serving Workers	0.89	Accounting	1.24
Customer Service Representatives	0.87	Warehousing	1.14
First-Line Supervisors of Retail Sales Workers	0.86	Customer Satisfaction	1.05
Heavy & Tractor-Trailer Truck Drivers	0.82	Cardiopulmonary Resusc. (CPR)	0.97
Light Truck Drivers	0.70	Selling Techniques	0.95
Registered Nurses	0.59	Restaurant Operation	0.95

Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

WHY IT MATTERS

An analysis of job postings can help reframe an understanding of the local job market from the employer's perspective rather than simply through the lens of government statistics. This analysis uses job postings from the prior calendar year to identify the most sought-out occupations (first column) and the most frequently occurring words and phrases (second column). LQs are used to approximate the local intensity of recruiting efforts and illustrate employer demand for specific hard skills. A help wanted ad that appears locally at five times the relative rate as the US would have an LQ of 5.00; likewise, a specific skill that appears more frequently in local postings than the national average would have an LQ greater than 1.00, suggesting higher demand in the local market. The results should prompt strategic questions about the alignment of the region's talent pipeline with the needs of employers and with target (traded) clusters.

FIGURE 20. TARGETING FRAMEWORK



Sources: US Economic Development Administration; Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.

MEDICAL SUPPLY CHAIN

FIGURE 21. TARGET SNAPSHOT

LAKE COUNTY	TOTAL	TARGET
2020 Establishments	20,251	101
2020 Employment	363,955	23,748
Net Chg., 2010–2020	+10,653	+768
Pct. Chg., 2010–2020	+3.0%	+3.3%

FIGURE 23. EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2020–2025	+5,970,448	+36,955
Pct. Chg., 2020–2025	+3.7%	+5.0%
LAKE COUNTY	**TOTAL**	**TARGET**
Net Chg., 2020–2025	-2,865	-363
Pct. Chg., 2020–2025	-0.8%	-1.5%

FIGURE 22. TARGET CONCENTRATION
LOCATION QUOTIENT TREND

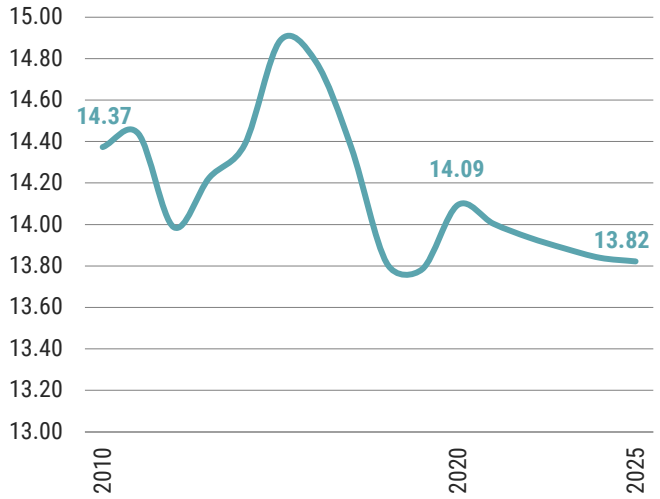


FIGURE 24. TARGET COMPONENTS
ANNUAL EMPLOYMENT

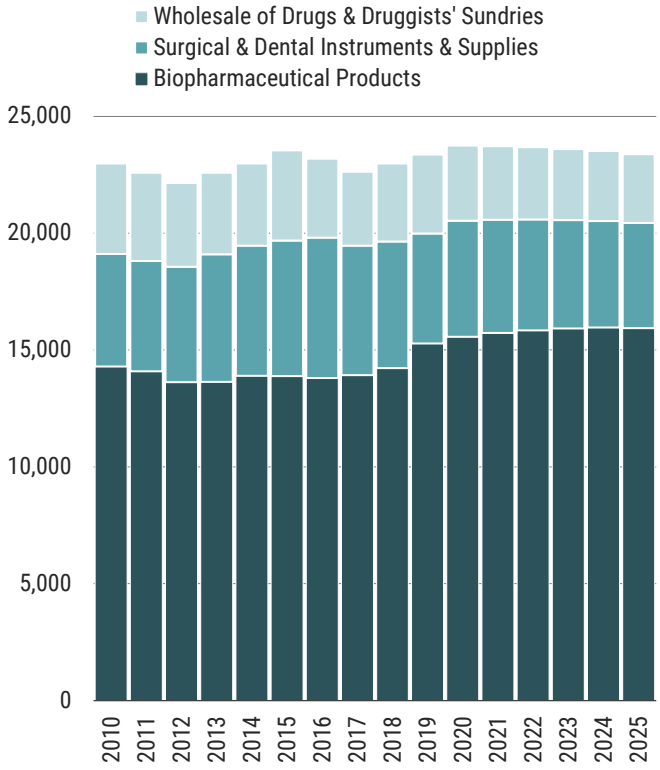
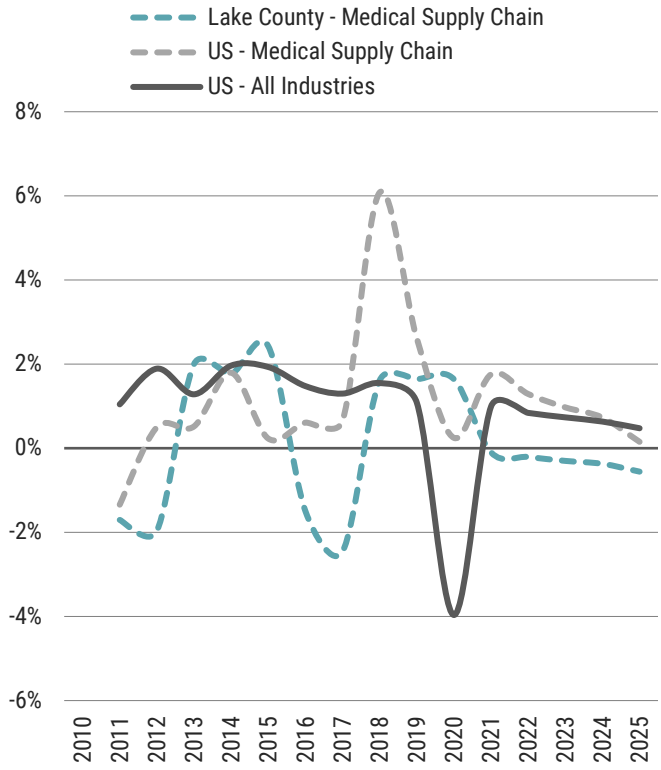


FIGURE 25. TARGET GROWTH
ANNUAL PERCENT CHANGE IN EMPLOYMENT



Sources: US Bureau of Labor Statistics; Emsi 2020.3—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

FIGURE 26. TARGET STAFFING PROFILE

LQs & RELATIVE EARNINGS: BELOW AVG → ← ABOVE AVG

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2020 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
51-9111	Packaging & Filling Machine Operators & Tenders	1,631	6.9%	1.63	17.35	1.11
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	1,199	5.0%	1.53	20.14	1.03
51-2098	Miscellaneous Assemblers & Fabricators	815	3.4%	0.73	16.85	1.05
53-7062	Laborers & Material Movers, Hand	803	3.4%	1.01	16.17	1.08
11-9121	Natural Sciences Managers	785	3.3%	2.50	59.73	0.90
51-1011	First-Line Supervisors, Production & Operations	702	3.0%	1.21	33.45	1.11
51-9011	Chemical Equipment Operators & Tenders	685	2.9%	1.77	26.10	1.08
19-2031	Chemists	627	2.6%	1.37	37.26	0.98
41-4012	Sales Reps, Non-Technical and Scientific Products	615	2.6%	0.58	32.43	1.10
11-1021	General & Operations Managers	600	2.5%	1.03	55.19	1.11
51-9023	Mixing & Blending Machine Operators	588	2.5%	1.56	20.24	1.09
17-2112	Industrial Engineers	550	2.3%	1.17	45.67	1.07
19-1042	Medical Scientists, Except Epidemiologists	509	2.1%	1.81	42.62	0.97
11-3051	Industrial Production Managers	453	1.9%	1.71	56.45	1.09
43-4051	Customer Service Representatives	452	1.9%	0.70	19.04	1.11
41-4011	Sales Reps, Technical and Scientific Products	420	1.8%	0.39	44.08	1.06
43-5071	Shipping, Receiving, & Inventory Clerks	398	1.7%	1.06	19.31	1.14
19-4031	Chemical Technicians	387	1.6%	2.02	25.31	1.06
13-1198	Business Operations Specialists, All Other	335	1.4%	1.08	40.06	1.08
51-9081	Dental Laboratory Technicians	313	1.3%	0.46	25.87	1.28
49-9071	Maintenance & Repair Workers, General	303	1.3%	1.24	22.66	1.16
49-9041	Industrial Machinery Mechanics	289	1.2%	1.17	30.33	1.14
43-9061	Office Clerks, General	288	1.2%	0.86	18.14	1.07
53-7064	Packers & Packagers, Hand	287	1.2%	1.17	16.04	1.19
11-2021	Marketing Managers	267	1.1%	1.89	63.88	0.96

Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

WHY IT MATTERS

Each target industry is underpinned by its workforce, making the occupational composition of each target worthy of further analysis. This figure shows each target's largest occupational contributors. The number of local jobs for each occupation is shown along with the occupation's weight (in percentage terms) within the target. The LQ compares the occupation's local weight to its national weight within this target. An LQ that exceeds 1.00 indicates a local occupation employed more heavily by the local target industry than national patterns might imply, while an LQ below 1.00 indicates relatively lighter local reliance on the occupation. Median local hourly earnings accompany the occupations shown in the exhibit. Wage ratios exceeding 1.00 indicate higher pay than the same occupation might expect nationally, while ratios below 1.00 suggest relatively lower compensation than the national level.

FINANCIAL & BENEFIT SERVICES

FIGURE 27. TARGET SNAPSHOT

LAKE COUNTY	TOTAL	TARGET
2020 Establishments	20,251	511
2020 Employment	363,955	12,057
Net Chg., 2010–2020	+10,653	+1,785
Pct. Chg., 2010–2020	+3.0%	+17.4%

FIGURE 29. EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2020–2025	+5,970,448	+118,909
Pct. Chg., 2020–2025	+3.7%	+3.3%
LAKE COUNTY	**TOTAL**	**TARGET**
Net Chg., 2020–2025	-2,865	+655
Pct. Chg., 2020–2025	-0.8%	+5.4%

FIGURE 28. TARGET CONCENTRATION
LOCATION QUOTIENT TREND

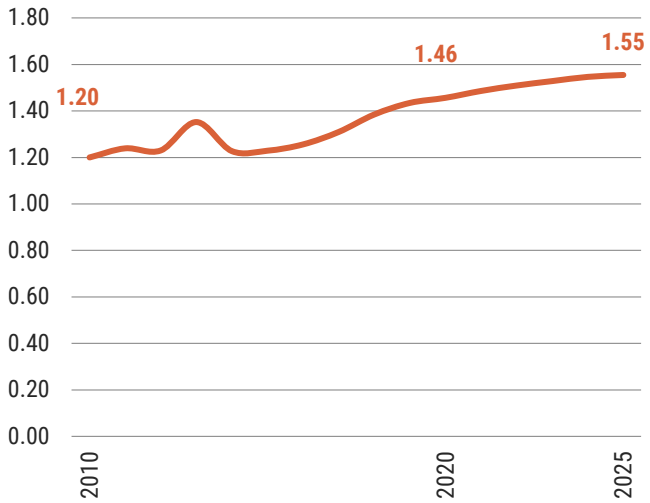


FIGURE 30. TARGET COMPONENTS
ANNUAL EMPLOYMENT

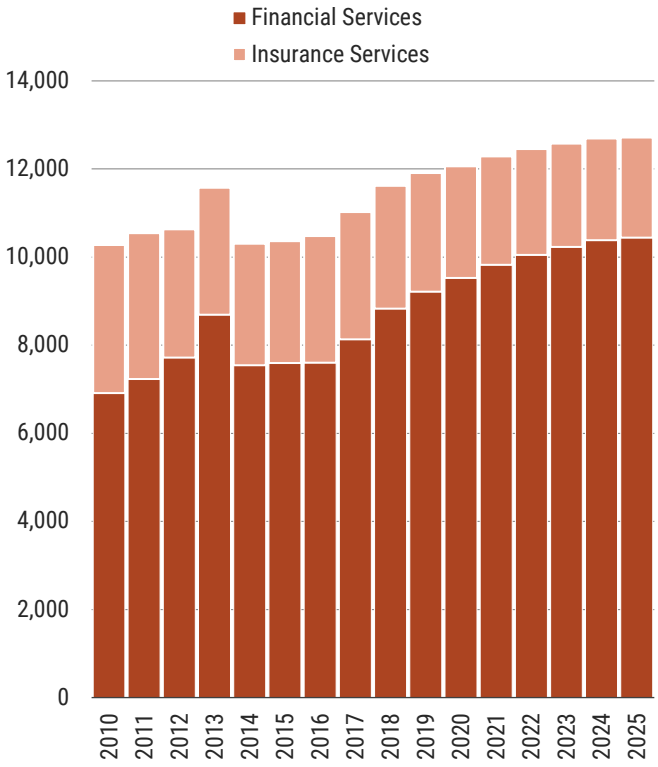
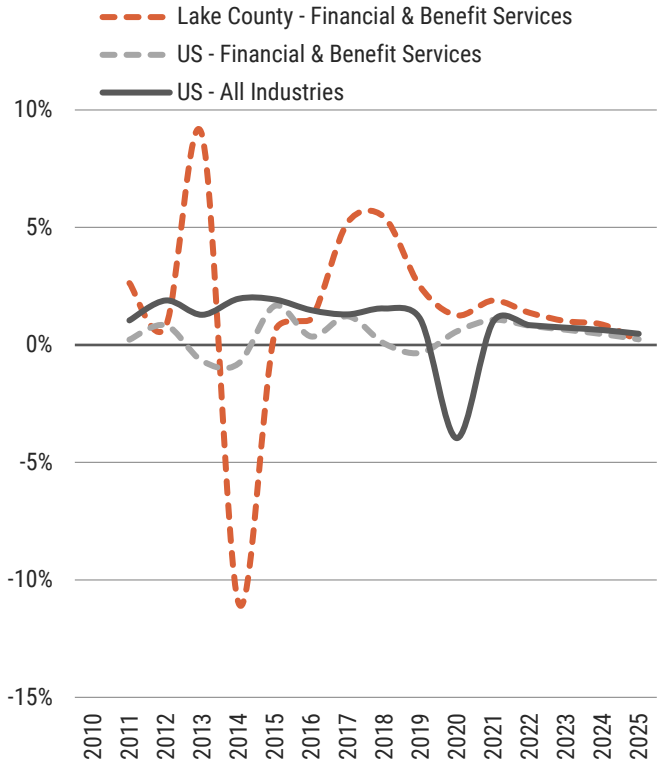


FIGURE 31. TARGET GROWTH
ANNUAL PERCENT CHANGE IN EMPLOYMENT



Sources: US Bureau of Labor Statistics; Emsi 2020.3—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

FIGURE 32. TARGET STAFFING PROFILE

LQs & RELATIVE EARNINGS: BELOW AVG→ ←ABOVE AVG

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2020 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
43-4051	Customer Service Representatives	1,199	9.9%	1.21	19.04	1.11
41-3031	Financial Services Sales Agents	907	7.5%	1.00	29.65	0.96
11-3031	Financial Managers	648	5.4%	1.50	64.21	1.00
13-2098	Financial, Investment, Risk Specialists, All Other	550	4.6%	1.07	39.01	0.97
13-2072	Loan Officers	513	4.3%	1.19	25.78	0.84
15-1256	Software Developers, Analysts, & Testers	474	3.9%	1.39	50.62	0.96
13-2052	Personal Financial Advisors	392	3.3%	0.54	44.20	1.01
43-3011	Bill & Account Collectors	371	3.1%	3.25	18.65	1.02
43-3071	Tellers	367	3.0%	1.20	15.03	0.96
13-1111	Management Analysts	357	3.0%	1.53	40.64	0.96
43-4131	Loan Interviewers & Clerks	352	2.9%	1.11	18.10	0.91
43-1011	First-Line Supervisors, Office & Administrative	316	2.6%	0.96	30.72	1.09
41-3021	Insurance Sales Agents	308	2.6%	0.54	25.58	1.01
11-1021	General & Operations Managers	280	2.3%	1.06	55.19	1.11
43-3031	Bookkeeping, Accounting, & Auditing Clerks	276	2.3%	1.63	21.95	1.08
13-2011	Accountants & Auditors	248	2.1%	0.92	33.91	0.96
13-1198	Business Operations Specialists, All Other	219	1.8%	0.98	40.06	1.08
13-2041	Credit Analysts	205	1.7%	2.30	28.70	0.80
13-1161	Market Research Analysts & Marketing Specialists	203	1.7%	1.38	31.04	0.98
43-9061	Office Clerks, General	202	1.7%	0.93	18.14	1.07
15-1211	Computer Systems Analysts	196	1.6%	1.08	44.02	0.98
13-2053	Insurance Underwriters	154	1.3%	0.61	33.74	0.98
11-3021	Computer & Information Systems Managers	147	1.2%	1.24	71.79	0.99
11-2022	Sales Managers	146	1.2%	1.67	66.56	1.06
43-9041	Insurance Claims & Policy Processing Clerks	144	1.2%	0.35	19.03	0.94

Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

TECHNICAL & PROFESSIONAL SERVICES

FIGURE 33. TARGET SNAPSHOT

LAKE COUNTY	TOTAL	TARGET
2020 Establishments	20,251	1,679
2020 Employment	363,955	24,793
Net Chg., 2010–2020	+10,653	+4,869
Pct. Chg., 2010–2020	+3.0%	+24.4%

FIGURE 35. EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2020–2025	+5,970,448	+812,137
Pct. Chg., 2020–2025	+3.7%	+9.9%
LAKE COUNTY	**TOTAL**	**TARGET**
Net Chg., 2020–2025	-2,865	+722
Pct. Chg., 2020–2025	-0.8%	+2.9%

FIGURE 34. TARGET CONCENTRATION
LOCATION QUOTIENT TREND

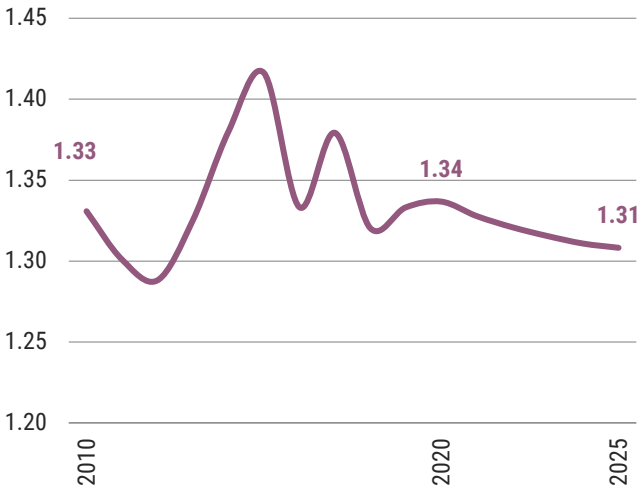


FIGURE 36. TARGET COMPONENTS
ANNUAL EMPLOYMENT

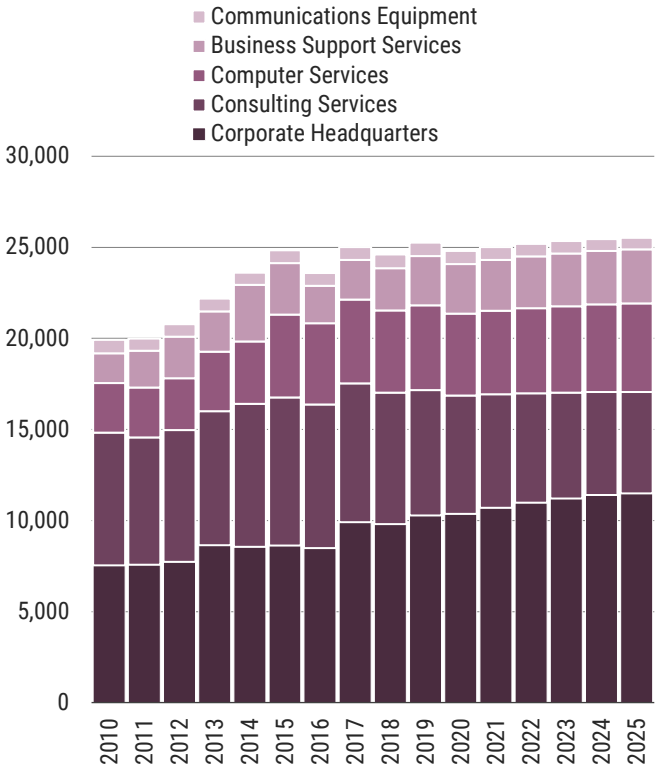
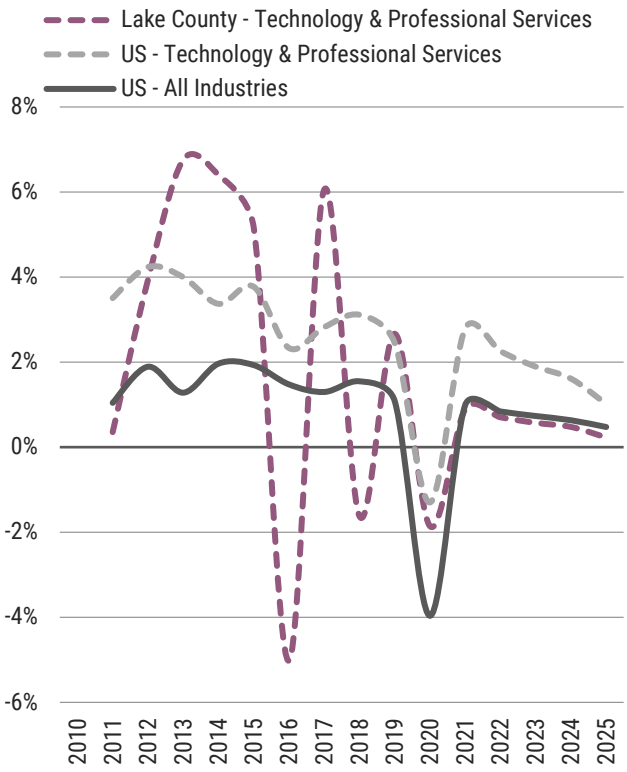


FIGURE 37. TARGET GROWTH
ANNUAL PERCENT CHANGE IN EMPLOYMENT



Sources: US Bureau of Labor Statistics; Emsi 2020.3—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

FIGURE 38. TARGET STAFFING PROFILE

LQs & RELATIVE EARNINGS: BELOW AVG → ← ABOVE AVG

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2020 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
15-1256	Software Developers, Analysts, & Testers	1,554	6.3%	0.73	50.62	0.96
13-1111	Management Analysts	1,488	6.0%	1.33	40.64	0.96
11-1021	General & Operations Managers	1,095	4.4%	1.36	55.19	1.11
43-4051	Customer Service Representatives	950	3.8%	0.70	19.04	1.11
13-1161	Market Research Analysts & Marketing Specialists	811	3.3%	1.34	31.04	0.98
13-2011	Accountants & Auditors	801	3.2%	1.16	33.91	0.96
13-1198	Business Operations Specialists, All Other	768	3.1%	1.01	40.06	1.08
15-1211	Computer Systems Analysts	757	3.1%	0.95	44.02	0.98
41-3091	Sales Reps, Miscellaneous Services	708	2.9%	1.08	30.45	1.08
11-3031	Financial Managers	656	2.6%	1.84	64.21	1.00
43-9061	Office Clerks, General	618	2.5%	1.26	18.14	1.07
11-2021	Marketing Managers	586	2.4%	2.12	63.88	0.96
11-3021	Computer & Information Systems Managers	584	2.4%	1.00	71.79	0.99
43-3031	Bookkeeping, Accounting, & Auditing Clerks	502	2.0%	1.12	21.95	1.08
13-1071	Human Resources Specialists	426	1.7%	1.02	30.46	1.00
11-9198	Personal Service & Recreation Managers, All Other	419	1.7%	1.29	46.92	1.17
15-1232	Computer User Support Specialists	413	1.7%	0.55	25.55	1.01
13-2098	Financial, Investment, Risk Specialists, All Other	387	1.6%	1.46	39.01	0.97
11-2022	Sales Managers	340	1.4%	1.54	66.56	1.06
43-6014	Secretaries & Administrative Assistants, All Other	297	1.2%	0.83	19.92	1.07
43-1011	First-Line Supervisors, Office & Administrative	297	1.2%	0.80	30.72	1.09
43-6011	Executive Secretaries & Administrative Assistants	265	1.1%	1.42	29.73	0.98
15-1231	Computer Network Support Specialists	248	1.0%	1.25	31.10	0.99
15-1299	Computer, All Other	247	1.0%	0.59	43.59	0.99
53-7062	Laborers & Material Movers, Hand	245	1.0%	1.30	16.17	1.08

Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

INDUSTRIAL & CONSUMER SUPPLIES

FIGURE 39. TARGET SNAPSHOT

LAKE COUNTY	TOTAL	TARGET
2020 Establishments	20,251	421
2020 Employment	363,955	17,139
Net Chg., 2010–2020	+10,653	+3,650
Pct. Chg., 2010–2020	+3.0%	+27.1%

FIGURE 41. EMPLOYMENT OUTLOOK

US OVERALL	TOTAL	TARGET
Net Chg., 2020–2025	+5,970,448	-47,755
Pct. Chg., 2020–2025	+3.7%	-2.2%
LAKE COUNTY	**TOTAL**	**TARGET**
Net Chg., 2020–2025	-2,865	+921
Pct. Chg., 2020–2025	-0.8%	+5.4%

FIGURE 40. TARGET CONCENTRATION
LOCATION QUOTIENT TREND

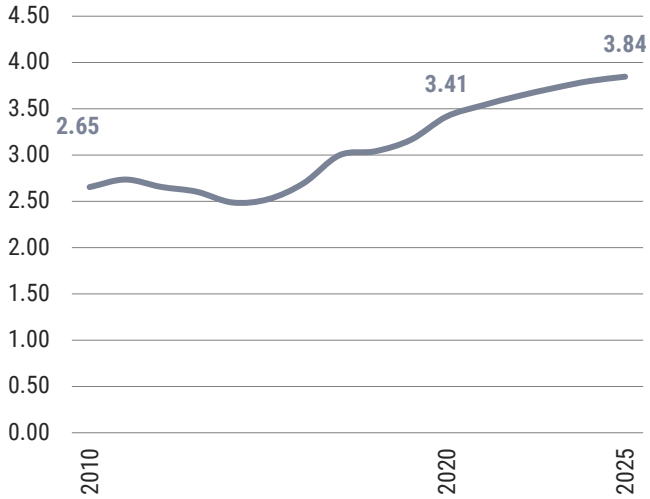


FIGURE 42. TARGET COMPONENTS
ANNUAL EMPLOYMENT

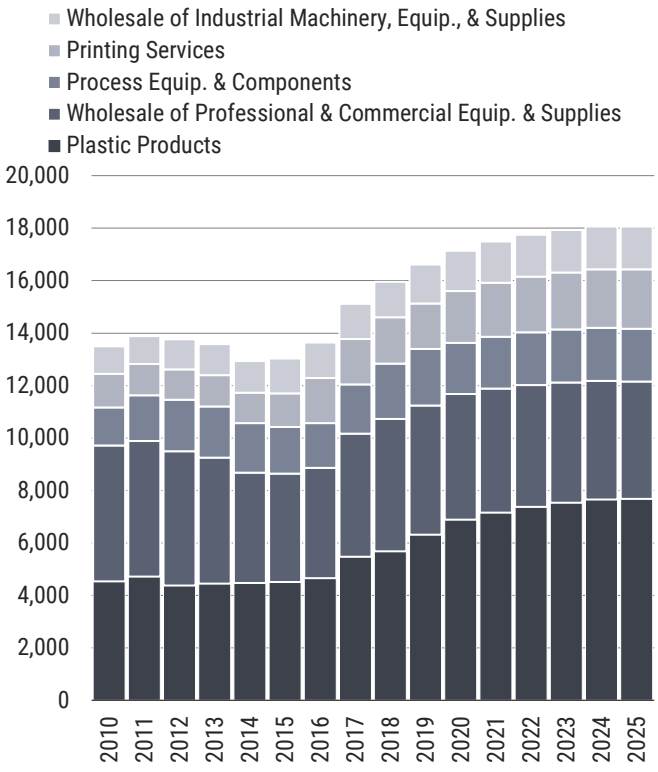
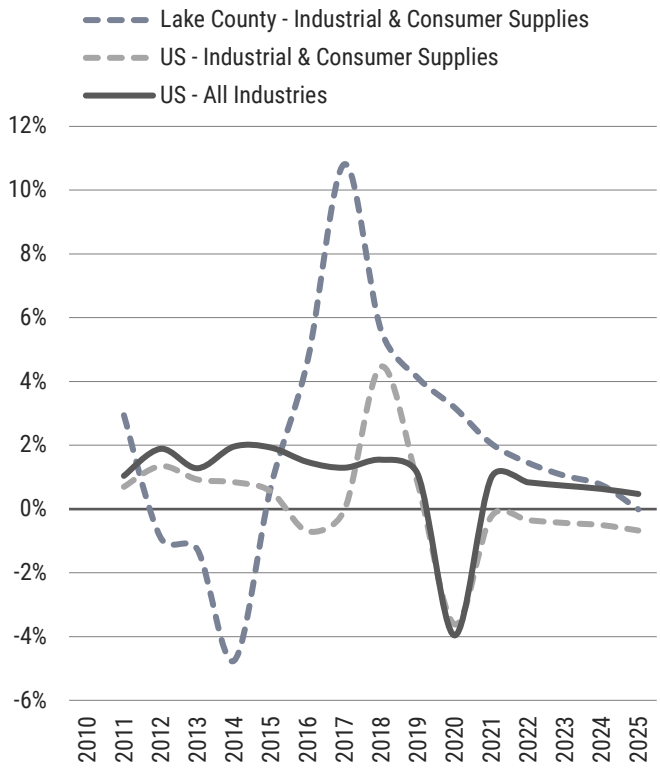


FIGURE 43. TARGET GROWTH
ANNUAL PERCENT CHANGE IN EMPLOYMENT



Sources: US Bureau of Labor Statistics; Emsi 2020.3—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

FIGURE 44. TARGET STAFFING PROFILE

LQs & RELATIVE EARNINGS: BELOW AVG → ← ABOVE AVG

STANDARD OCCUPATIONAL CLASSIFICATION		EMPLOYMENT			EARNINGS	
Code	Description	2020 Jobs	% of Target	LQ (US= 1.00)	Local Hourly Median	Relative to US (US=1.00)
51-4072	Molding Machine Operators, Metal & Plastic	1,083	6.3%	2.20	18.54	1.17
41-4012	Sales Reps, Non-Technical and Scientific Products	1,007	5.9%	0.80	32.43	1.10
51-2098	Miscellaneous Assemblers & Fabricators	1,005	5.9%	1.42	16.85	1.05
53-7062	Laborers & Material Movers, Hand	744	4.3%	1.32	16.17	1.08
51-5112	Printing Press Operators	528	3.1%	0.68	19.37	1.07
43-4051	Customer Service Representatives	525	3.1%	0.83	19.04	1.11
53-7064	Packers & Packagers, Hand	524	3.1%	2.15	16.04	1.19
11-1021	General & Operations Managers	497	2.9%	1.03	55.19	1.11
43-5071	Shipping, Receiving, & Inventory Clerks	486	2.8%	1.25	19.31	1.14
51-1011	First-Line Supervisors, Production & Operations	458	2.7%	1.19	33.45	1.11
51-9061	Inspectors, Testers, Sorters, Samplers, & Weighers	444	2.6%	1.52	20.14	1.03
51-4081	Multiple Machine Tool Operators, Metal & Plastic	389	2.3%	2.96	19.57	1.09
43-9061	Office Clerks, General	328	1.9%	0.96	18.14	1.07
51-4031	Cutting & Press Machine Operators, Metal & Plastic	291	1.7%	1.81	18.68	1.05
51-4041	Machinists	268	1.6%	1.84	20.93	0.95
49-9041	Industrial Machinery Mechanics	260	1.5%	0.71	30.33	1.14
41-4011	Sales Reps, Technical and Scientific Products	248	1.4%	0.45	44.08	1.06
15-1256	Software Developers, Analysts, & Testers	246	1.4%	0.89	50.62	0.96
49-9071	Maintenance & Repair Workers, General	227	1.3%	1.30	22.66	1.16
11-2022	Sales Managers	221	1.3%	1.27	66.56	1.06
51-5113	Print Binding & Finishing Workers	218	1.3%	0.85	19.66	1.19
43-3031	Bookkeeping, Accounting, & Auditing Clerks	196	1.1%	0.71	21.95	1.08
49-2011	Computer & Office Machine Repairers	192	1.1%	0.90	23.61	1.22
17-2112	Industrial Engineers	173	1.0%	1.32	45.67	1.07
53-7051	Industrial Truck & Tractor Operators	170	1.0%	1.27	21.06	1.17

Sources: US Bureau of Labor Statistics; Emsi 2020.2—QCEW Employees, Non-QCEW Employees, and Self-Employed; US Economic Development Administration; Institute for Strategy and Competitiveness at Harvard Business School; TIP Strategies, Inc.
Note: The cluster methodology developed at Harvard Business School has been adjusted by TIP Strategies, Inc., to align with the six-digit NAICS classifications used by Emsi.

APPENDIX D. ECONOMIC DEVELOPMENT RESOURCES

CATEGORY	ORGANIZATION	CONTACT
County	Lake County Administrator's Office	www.lakecountyil.gov/2493/
County	Lake County Board	www.lakecountyil.gov/2266/
County	Lake County Dept. of Building, Planning & Development	www.lakecountyil.gov/185/
County	Lake County Division of Transportation	www.lakecountyil.gov/191/Transportation
Economic Dev.	Lake County Partners	www.lakecountypartners.com/
Education	College of Lake County	www.clcillinois.edu/
Education	Lake County High Schools Technology Campus	www.techcampus.org/
Education	Lake Forest College	www.lakeforest.edu/
Education	Rosalind Franklin University of Medicine and Science	www.rosalindfranklin.edu/
Foundation	Gorter Family Foundation	gorterfamilyfoundation.org/
Housing	Community Partners for Affordable Housing	www.cpahousing.org/
Manufacturing	Illinois Manufacturing Excellence Center	www.imec.org/mobile-home/
Municipal	Lake County Cities, Villages, & Townships	www.lakecountyil.gov/BusinessDirectoryII.aspx
Nonprofit	Beacon Place / Broadband Project	beacon-place.org/
Small Business	Lake County Chamber	www.lakecountychamber.com/
Tourism	Visit Lake County	www.visitlakecounty.org/
Workforce	Lake County Workforce Development Board	www.lakecountyworkforce.org/
Workforce	Lake County Workforce Ecosystem	www.lakecountypartners.com/workforce/

Source: Compiled by TIP Strategies.
Note: This list of resources was compiled based on the organizations with representation on the CEDS Committee who were most active in the execution of this plan. This is not an exhaustive list of economic development resources available from localities, the county, or the state.

APPENDIX E. ACKNOWLEDGEMENTS

TIP would like to thank the following leaders and organizations for their participation in this planning process, as well as all of the individuals who provided feedback during the public comment period from January 11 to February 11, 2022.

CEDS STEERING COMMITTEE

- Cameron Adams, *Laser Precision*
- Jeff Adams, *Laser Precision*
- Scott Adams, *GMLV Chamber of Commerce*
- David Alexander, *Alexander Law*
- Rob Anthony, *Community Partners for Affordable Housing*
- Chris Blaylock, *Wipfli*
- Scott Brandwein, *JLL*
- Derrick Burress, *Lake County Tech Campus*
- Kevin Considine, *Lake County Partners*
- Gabrielle Cummings, *NorthShore Highland Park Hospital*
- Frank Deuel, *Comcast*
- Ken Endress, *Naval Station Great Lakes*
- Mandi Florip, *Lake County Municipal League*
- Dean Glassberg, *First Midwest Bank*
- Trent Gordon, *Advocate Aurora Health*
- Sandy Hart, *Lake County Board*
- Jim Hawkins, *Lake County Administrator's Office*
- Richard Korengold, *Mesirow Financial*
- Gordon Lamphere, *Van Vlissingen*
- Christina Lechter, *AbbVie*
- Joe Luna, *JPMorgan Chase & Co.*
- Steve Madden, *Libertyville Bank & Trust*
- Ann Maine, *Lake County Board & Workforce Board*
- Mayor Dominic Marturano, *Village of Lindenhurst*
- John McCann, *ComEd*
- Austin McFarlane, *Lake County Public Works*
- Matt Meyers, *Lake County Administrator's Office*
- Ali O'Brien, *College of Lake County*
- Brenda O'Connell, *Lake County Community Development*
- Dulce Ortiz, *Mano a Mano*
- Mark Pfizter, *Lake County Health Department*
- Frank Plescia, *Horizon Therapeutics*
- John Price, *North Chicago Community School District*
- Wendy Rheault, *Rosalind Franklin University of Medicine and Science*
- Cheri Richardson, *Gorter Family Foundation*
- Maureen Riedy, *Visit Lake County*
- Shane Schneider, *Lake County Division of Transportation*
- Gina Schuyler, *Grayslake High School District*
- Jennifer Serino, *Lake County Workforce Development*
- Jackie Slaats, *Lake Forest College*
- Brian Stewart, *Aerotek*
- Kent Street, *Village of Deerfield*
- Lori Suddick, *College of Lake County*
- Peggy Talbot, *Beacon Place*
- Jessica Vealitzik, *Lake County Board*
- Eric Waggoner, *Lake County Building, Planning & Development*
- Andrew Warrington, *United Conveyor Corporation*
- Steve Whittington, *LifeWorking Coworking*
- Andria Winters, *CBRE*

ROUNDTABLE AND WORKSHOP PARTICIPANTS

- Mike Abrahamson, *Partnership for College Completion*
- Scott Adams, *GMLV Chamber of Commerce*
- Jeff Adams, *Laser Precision*
- Cameron Adams, *Laser Precision*
- David Alexander, *Alexander Law*
- Marah Altenberg, *Lake County Board*
- Greg Anderson, *Village of Wauconda*
- Rob Anthony, *Community Partners for Affordable Housing*
- Mitch Bienvenue, *Small Business Development Center*
- Chris Blaylock, *Wipfli*
- Matt Botos, *ConnectFood*
- Darren Boundy, *ComEd*
- Scott Brandwein, *JLL*
- Derrick Burress, *Lake County Tech Campus*
- Trustee Sol Cabachuela, *Village of Mundelein*
- Laura Caplan, *Primo*
- Laura Cison, *Stompin' Grounds Café*
- John Conrad, *iBio*
- Gabrielle Cummings, *NorthShore University HealthSystem Highland Park Hospital*
- Jack Danilkowicz, *Horizon Therapeutics*
- Chad Dershaw, *Volle's Bridal and Boutique*
- Susanne Dershaw, *Volle's Bridal and Boutique*
- Scott DeMuth, *G2revolution*
- Frank Deuel, *Comcast*
- John Edgecomb, *Fresh Start Business Incubator*
- Austen Edwards, *Chicago Metropolitan Agency for Planning*
- Ken Endress, *Naval Station Great Lakes*
- Brandon Ewing, *Waukegan Community Unit School District*
- Larry Falbe, *Law Firm of Miller Canfield*
- Mike Florczak, *Warren Barr Lincolnshire*
- Mandi Florip, *Lake County Municipal League*
- Richard Franco, *Northwestern Medicine*
- Antonio Garcia, *Lake County Workforce Development*
- Gary Gibson, *Lake County Administrator's Office*
- Dean Glassberg, *First Midwest Bank*
- Trent Gordon, *Advocate Aurora Health*
- Brian Grano, *Mickey Finn's Brewery*
- Chris Hammerlund, *Assured Healthcare Staffing*
- Don Hansen, *W.W. Grainger*
- Demar Harris, *Lake County Workforce Development*
- Sandy Hart, *Lake County Board*
- Jim Hawkins, *Lake County Administrator's Office*
- Cassandra Hiller, *Lake County Administrator's Office*
- Kevin Hunter, *Lake County Board*
- Tom Hutchinson, *Nicor*
- Trustee Marc Jones, *Waukegan Township*
- Dan Joyce, *Portage Plastics Corporation*
- Dimitri Kallianis, *The Shanty, Captain Porky's, Duck Inn*
- Michael Karner, *Lake County Regional Office of Education*
- Pamela Kibbons, *Round Lake Area School District*
- Kevin Kim, *Small Business Development Center*
- Suzanne Klauke, *Township High School District*
- Richard Korengold, *Mesirow Financial*
- John Krajnak, *Six Flags Great America*
- Mike Kravets, *Visual Pak*
- Brett Kroner, *Cushman & Wakefield*
- Angelo Kyle, *Lake County Board*
- Gordon Lamphere, *Van Vlissingen & Co.*
- Christina Lechter, *AbbVie*
- Jim Lederer, *Bluegrass*
- Joe Luna, *JPMorgan Chase & Co.*
- Rick Mack, *Metra*
- Steve Madden, *Libertyville Bank & Trust*
- John Maguire, *Visit Lake County*

Roundtable and Workshop Participants, CONTINUED

- Ann Maine, *Lake County Board and Workforce Board*
- Tim Marabella, *Great Lakes Construction Association*
- Mike May, *Village of Volo*
- Mayor Dominic Marturano, *Village of Lindenhurst*
- John McCann, *ComEd*
- Amy McEwan, *Chicago Metropolitan Agency for Planning*
- Austin McFarlane, *Lake County Public Works*
- Melinda Metzger, *Pace Suburban Bus*
- Matt Meyers, *Lake County*
- Maggie Morales, *Lake County Community Foundation*
- Kevin Myers, *Mundelein High School District*
- Ali O'Brien, *College of Lake County*
- Brenda O'Connell, *Lake County Community Development*
- Jeanette Ocampo, *Great Wolf Lodge Illinois*
- Pete Olson, *Lake County Building and Construction Trades Council*
- Dulce Ortiz, *Mano a Mano*
- Jason Osborn, *Metra*
- Carmen Patlan, *Highwood Public Library*
- John Pelissero, *Loyola University Chicago*
- Donovan Pepper, *Walgreens*
- Mark Pfister, *Lake County Health Department*
- Frank Plescia, *Horizon Therapeutics*
- John Price, *North Chicago Community School District*
- Wendy Rheault, *Rosalind Franklin University of Medicine and Science*
- Cheri Richardson, *Gorter Family Foundation*
- Maureen Riedy, *Visit Lake County*
- James Rolfe, *CIBC*
- Arlene Santos-George, *College of Lake County*
- Shane Schneider, *Lake County Division of Transportation*
- Gina Schuyler, *Grayslake High School District*
- Jennifer Serino, *Lake County Workforce Development*
- Jason Sfire, *Fidelity Group*
- Jackie Slaats, *Lake Forest College*
- Linda Soto, *Lake County Transportation Alliance*
- Brian Stewart, *Aerotek*
- Valeria J. Stokes, *Erie Health*
- Karen Stoneman, *Sysmex*
- Kent Street, *Village of Deerfield*
- Elizabeth Striegal, *Gurnee Mills - Simon Property Group*
- Lori Suddick, *College of Lake County*
- Patrice Sutton, *Lake County Finance and Administrative Services*
- Peggy Talbot, *Beacon Place*
- Shaunese Teamer, *Lake County Chamber of Commerce*
- Jessica Vealitzik, *Lake County Board*
- Sandra Villanueva, *College of Lake County*
- Eric Waggoner, *Lake County Department of Building, Planning & Development*
- Andrew Warrington, *United Conveyor Corporation*
- John Wasik, *Lake County Board*
- Steve Whittington, *LifeWorking Coworking*
- Andria Winters, *CBRE*
- Andrew Yang, *Spherotech*