



# ENVISION EAST CENTRAL IOWA

THINK-TANK REPORT - IOWA, USA

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October 2021



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This report summarizes the outcomes of the Envision East Central Iowa Think-Tank held on September 29, 2021. Approximately 122 regional stakeholders participated in the Think-Tank and developed the scenarios presented in this report. This report is part of the Envision East Central Iowa project, which aims to guide the next five years of regional decision-making with a new Comprehensive Economic Development Strategy (CEDS) plan.

Report Prepared by:



Think-Tank Hosted by:



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## FOREWORD

East Central Iowa’s Comprehensive Economic Development Strategy (CEDS) is a strategy-driven plan for regional economic development that is designed to build capacity and guide the economic prosperity and resilience of the region. The CEDS is a pre-requisite for the federal designation as an Economic Development District and must be updated every five years. Although the region’s last CEDS was updated in 2018, the timeline has been advanced due to the impacts of COVID-19. The project process that will create the new East Central Iowa CEDS is called ‘Envision East Central Iowa.’

In July 2021, a Strategy Committee consisting of 20 regional representatives was created to guide the project. For a complete list of Strategy Committee Members, please see the Acknowledgments section of this report on page 31. The committee met monthly and early on developed the following set of intentions for the new CEDS.

The agreed intention of the East Central Iowa’s Comprehensive Economic Development Strategy is to:

1. **Create a common vision** that will energize and unite the region around an economic development strategy and its implementation while acknowledging that implementation of the vision may look different in the various areas of the region.
2. **Build economic pathways for success** for both businesses and individuals, especially for those who are underrepresented, have significant barriers, or experienced greater harm due to COVID-19.
3. **Embrace, celebrate and leverage our varied and diverse strengths**, at both community and regional levels.
4. **Be inclusive** of different voices and perspectives.
5. **Identify areas for collaboration on economic development projects**, including ways existing assets and institutions can be leveraged for greater success across the region.
6. **Identify success markers** to promote collective accountability after plan adoption.

This project is being funded through the EDA CARES Act grant and as a result, the new CEDS will include a robust discussion of COVID-19 impacts and opportunities, and how the region can promote recovery and build resilience moving forward.



**Karen Kurt**  
*Executive Director,*  
ECICOG







The Envision East Central Iowa Think-Tank allowed regional stakeholders to take a 'deep-dive' into strategic visioning and future-thinking through a scenario-planning process.

## 1.0 INTRODUCTION

This scenario-based Think-Tank report summarizes the visioning and planning workshop that took place on September 29, 2021. The Think-Tank workshop was conducted as the first step in the project to develop an executable regional CEDS that will guide East Central Iowa for the next five years. The components of the planning work thus far have included the creation of a Strategy Committee to guide the process, stakeholder survey, Listening Sessions, long-term scenario planning as part of the strategic visioning workshop, discussion about expected and preferred futures, and an Expected and Preferred Survey. Below is the anticipated timeline of this strategic planning process.

### ENVISION EAST CENTRAL IOWA COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY



“We are strong-willed, resilient, and will have weathered a pandemic together! We have incredible assets at our disposal and will be poised to make some great decisions together.”

- Envision East Central Iowa Stakeholder Survey Respondent



In the face of accelerating speed of change, the key to resiliency is the ability to anticipate change and remain agile. To be successful, East Central Iowa's new CEDS will require the active involvement of all regional stakeholders.

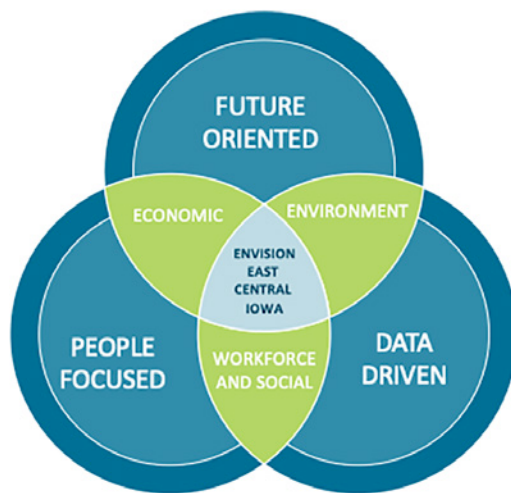
## 2.0 FRAMEWORK FOR ANALYSIS - KEY THEMES SHAPING THE FUTURE

The Think-Tank provided a forum for participants to explore the forces of change shaping the future of the East Central Iowa region. Participants at the Think-Tank explored emerging macro trends, key drivers, and possible future scenarios. Perceptions around the nature of impact of these forces, both in terms of size and timing of impact, were explored to gauge how important participants consider these forces of change. Participants discussed the emerging trends on global, regional, and local scales, and related them directly to East Central Iowa in terms of how well-prepared they considered the region.

Specifically, the participants used a triple-bottom line approach analysis involving three key themes:

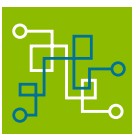
- Economic characteristics
- Workforce and social characteristics
- Environmental characteristics

Of relevance to the discussion is the speed and scale of change that is occurring in the region. Newly developed innovations are being implemented globally and locally at all scales, thereby changing the face of industries and society in a rapid and profound way. Advanced technologies are at the forefront of this transformation. At the same time, societal values are shifting, and there is an increased awareness of environmental factors and sustainable resource use.



“We have an incredible amount of assets available to us – knowledge, experts in their fields and world-class facilities for research, and the ‘will’ by our community to take action when we set the right course!”

- Envision East Central Iowa Stakeholder Survey Respondent



FutureInsight

### FUTURE INSIGHTS:

- The global pandemic has served to accelerate many existing trends, especially at the level of workplace transformation and the application of process automation.
- The Midwest has an enticing emerging value proposition, based on its strength in resources that underpin agriculture. This could be leveraged in East Central Iowa to deliver economic prosperity to the regional areas.



The stakeholder survey achieved a strong response rate from a variety of stakeholder groups. This suggests the survey reflects the desires of the broader region. Survey respondents self-identified as a fairly even mix of business, economic development, government, nonprofit and education professionals.

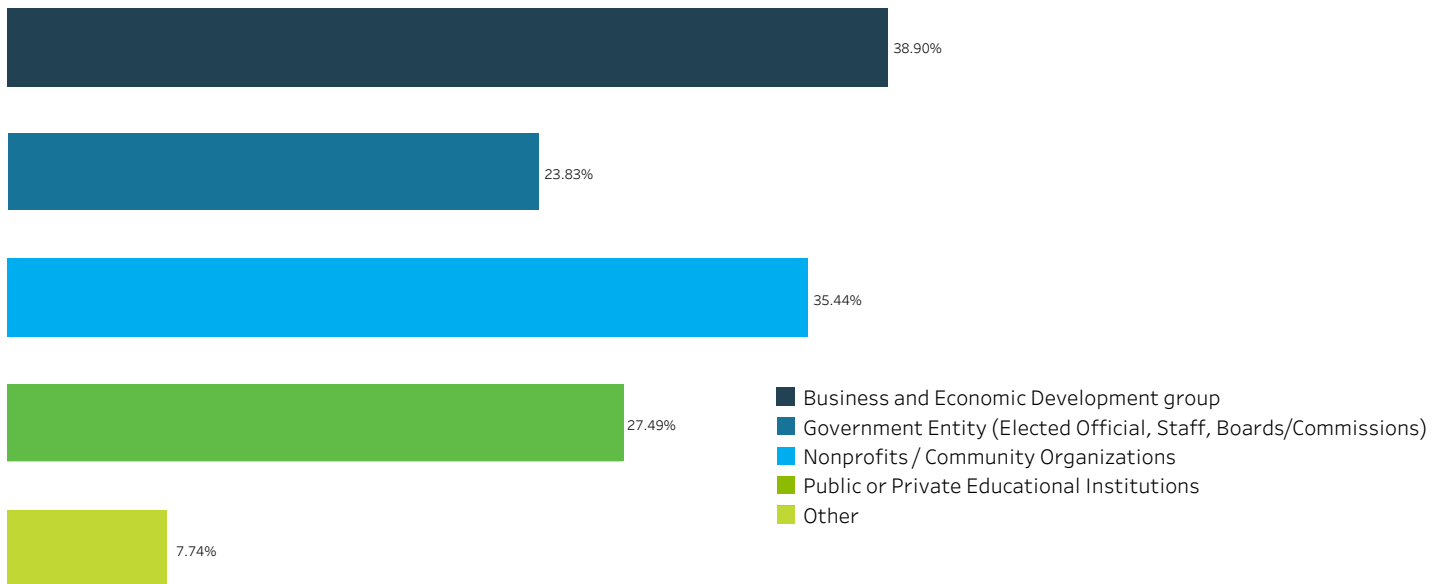
## 3.0 SURVEY RESULTS – KEY STAKEHOLDER INPUT

A stakeholder survey was conducted prior to the Think-Tank, to which 494 regional stakeholders responded. Respondents were asked about their views on having a shared vision for the future of East Central Iowa. Below are the compiled results of the stakeholder survey.

### 3.1 PROFILE INFORMATION

In terms of survey respondent demographics, most respondents were 31 or over, with 29% between the ages of 41-50. 93% of the respondents were white/Caucasian with 7% other race or preferring not to answer. Respondents were also asked which County they lived in, length of time living there, and their organizational affiliation. Below is a graphic showing the respondents' affiliations.

#### Which stakeholder groups are you affiliated with?



DataInsight

#### DATA INSIGHTS:

- The majority of survey respondents (88%) have lived and/or worked in East Central Iowa for over 11 years. The remaining 12% have lived in the region from 0-10 years.
- The majority of survey respondents came from Jones County (36%) and Linn County (37%) with the remaining responses from Johnson County (16%), Washington County (3%), Benton County (3%), Cedar County (1%) and Iowa County (1%). Four percent were from counties outside the region.





A shared vision for East Central Iowa was identified as important not only for the future of East Central Iowa, but also for regional decision-making.

### 3.2 IMPORTANCE OF A SHARED VISION

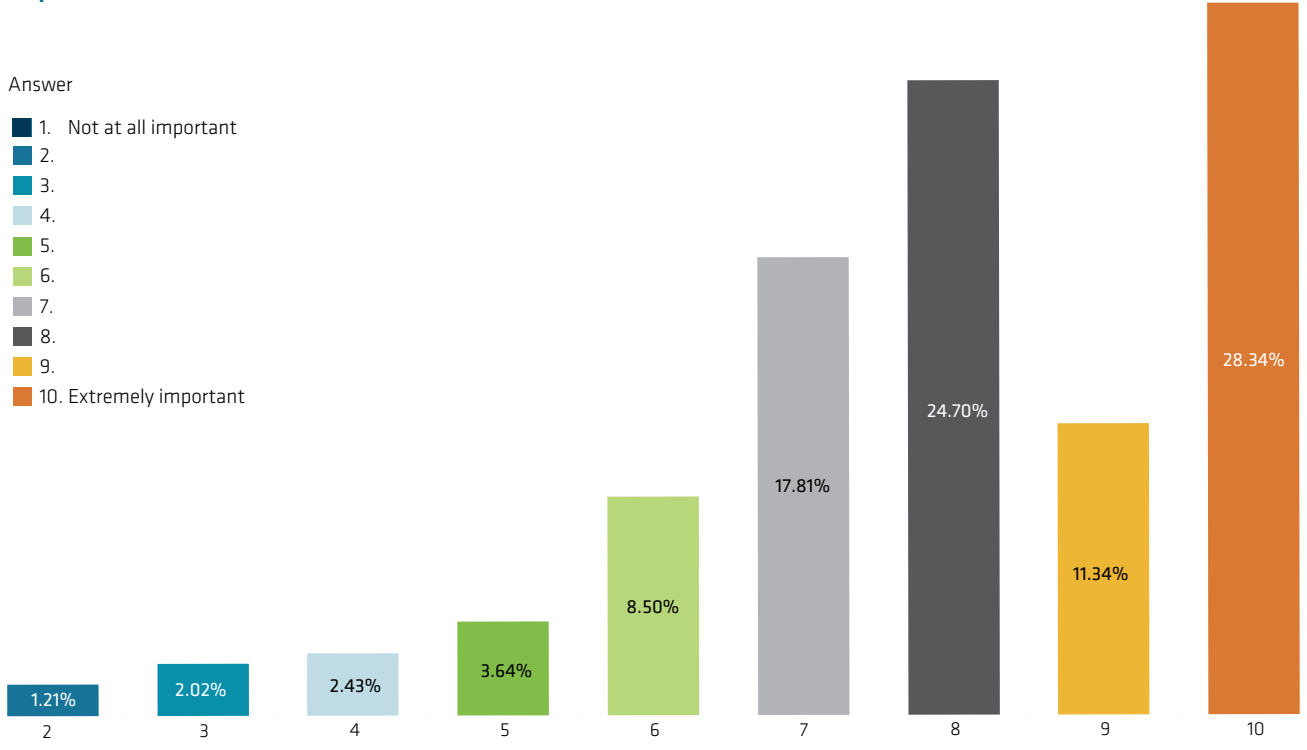
Survey respondents were asked two questions about the importance of having a shared vision for the future of East Central Iowa. The questions were:

- How important do you think it is to have a shared vision (an agreed future plan) for the future of East Central Iowa?
- How important is it to consider the shared vision when making decisions for East Central Iowa?

The scale was: 1 = Not at all important; 10 = Extremely important

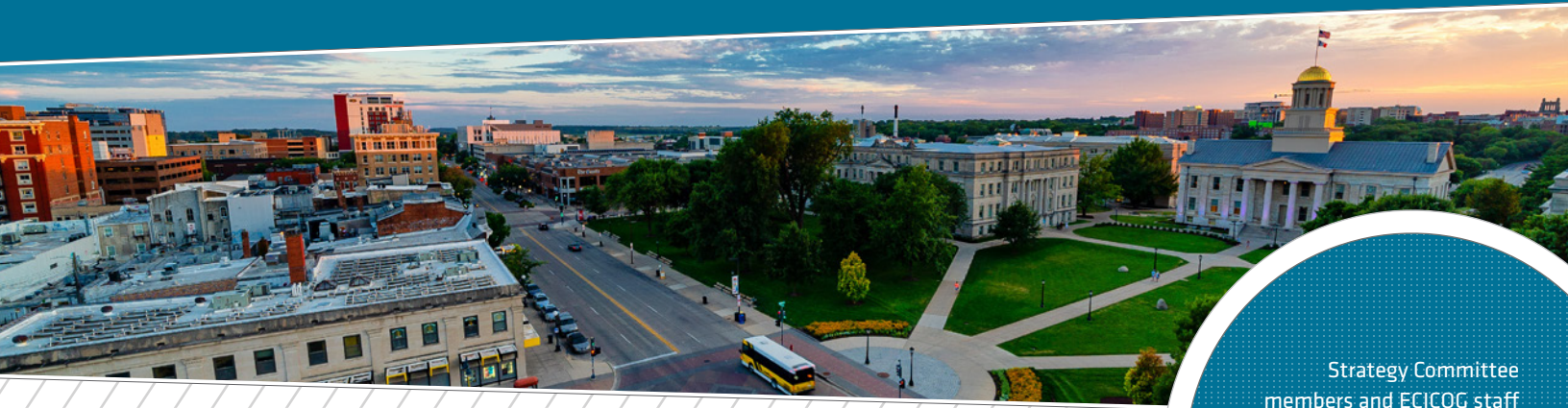
Below is an illustration of the responses to the importance of having a shared vision.

#### Importance of Vision



#### DATA INSIGHTS:

- Most survey responses are in the 7-10 range, indicating the importance of having a shared vision for East Central Iowa.
- It is notable that having a shared vision is perceived as being similarly important and impactful at both the regional and individual levels. This suggests strong support for action that will strongly influence and shape individual household and business behavior.



Strategy Committee members and ECICOG staff identified 21 key drivers impacting the East Central Iowa region. Drivers are trends, events, or changes that shape the future.

## 3.3 KEY DRIVER ANALYSIS

To analyze the perceived drivers and influences on the East Central Iowa region, ECICOG staff and the Strategy Committee compiled a list of key regional drivers with accompanying descriptions.

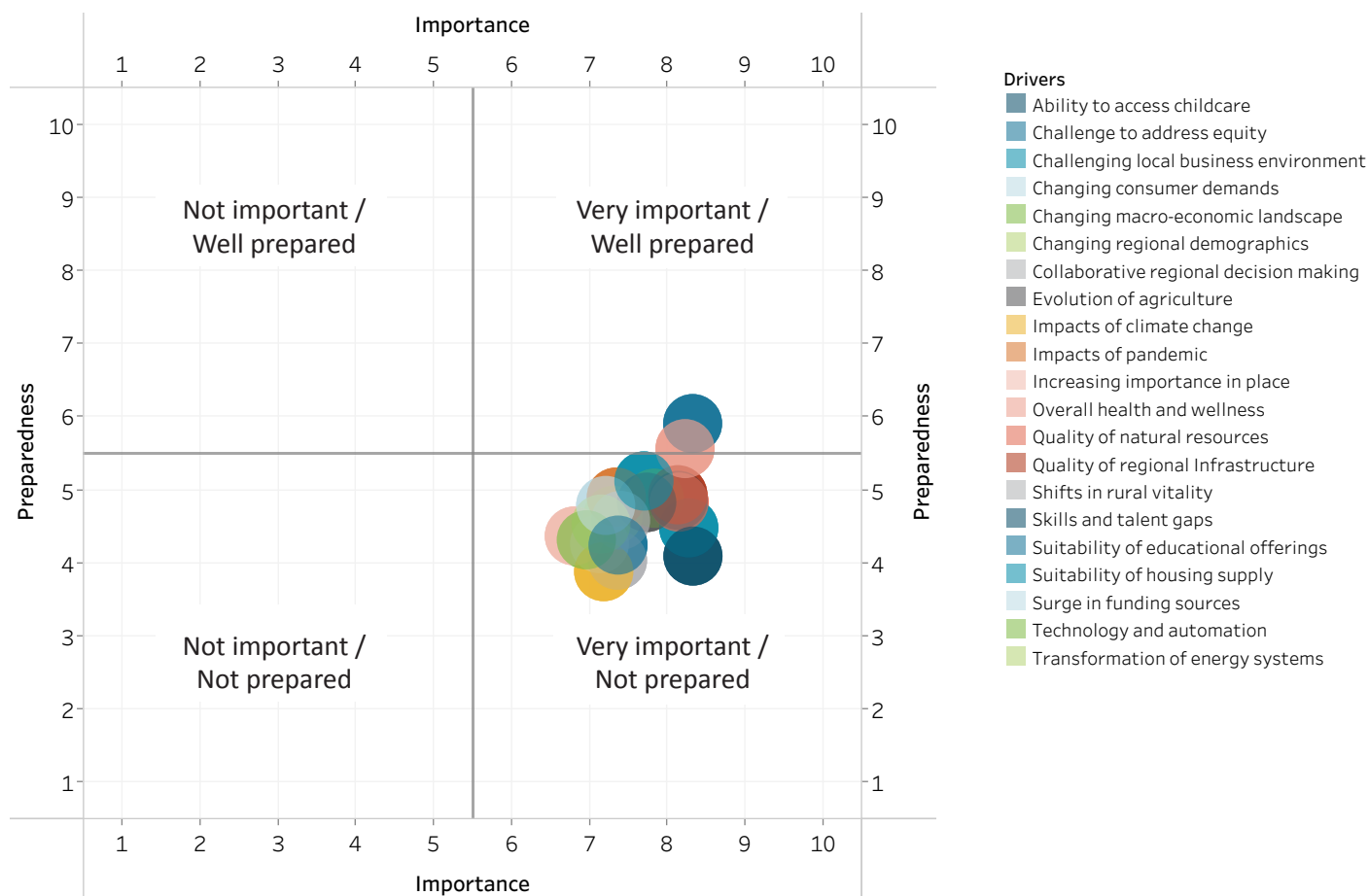
### 3.3.1 KEY DRIVERS SHAPING THE FUTURE

- **Evolution of agriculture:** New technology; changes in land ownership; new plant-based products (e.g., bio-plastics).
- **Changing macro-economic landscape:** larger corporations; new business and models (shift to online); trade tensions; macro-economic disparities.
- **Challenging local business environment:** Competition with other regions; variable innovation and entrepreneurship levels; skills and supply chain issues.
- **Technology and automation:** High-tech driven; impacts of AI and process automation; displacement of traditional technologies.
- **Quality of regional Infrastructure:** Aging roads and bridges, power, capacity issues, broadband access.
- **Transformation of energy systems:** Rapid shift to renewables, and displacement of traditional energy systems.
- **Quality of natural resources:** Changes to water and environmental quality; soil health and quality; mitigating nutrient run-off.
- **Impacts of climate change:** Impacts of changing weather patterns; extreme events; implications for flood frequency.
- **Suitability of housing supply:** Availability, affordability, and suitability of existing housing; regional proximity to employment bases and concentrations.
- **Surge in funding sources:** Short-to medium-term boost in government funding; (Includes all forms of government stimulus and payments, such as trade support).
- **Impacts of pandemic:** Medium-to long-term impacts of disruption; acceleration of trends such as automation; shift to remote and flexible work models.
- **Changing consumer demands:** Longer-term changes in consumer demands and sensitivities; increased environmental awareness and sensitivity.
- **Collaborative regional decision-making:** Challenges with political divisions and tensions; ability to collaborate on major regional decisions; inclusivity of decision-making process.
- **Skills and talent gaps:** Challenges with skills and talent gaps; ability for region to attract workers; adapting to new workplace models and systems.
- **Ability to access childcare:** Changing patterns of childcare availability and affordability; and uneven distribution across the region.
- **Changing regional demographics:** Aging rural populations; diversifying urban populations; concentration of population into regional centers.
- **Suitability of educational offerings:** Overall quality, availability, and affordability of education. Distribution and concentration of educational offering within region.
- **Overall health and wellness:** Increasing importance and focus on mental health; potential service shortage and provider burnout.
- **Shifts in rural vitality:** Rural population trajectory – static or declining; challenge to retain viability of local main streets.
- **Challenge to address equity:** Challenge from government and society to address systemic inequity, especially with minority groups.
- **Increasing importance in place:** Emerging focus on social amenities; importance of placemaking and public spaces; shifts in recreation desires and opportunities.



### 3.3.2 KEY DRIVERS – IMPORTANCE AND PERFORMANCE

Survey respondents were asked about the importance of 21 key drivers of change as they relate to the future of East Central Iowa. Survey participants were asked about the importance of the drivers as well as how well-prepared East Central Iowa is to deal with future challenges and opportunities associated with each driver.



DataInsight

#### DATA INSIGHTS:

- The drivers have been clustered primarily in the 'Important, and 'Not Prepared' quadrant. This represents a significant challenge for the region, as it reflects a sense of not being prepared across the vast majority of all the drivers.
- These drivers reflect the full range of issues for infrastructure, social and industry. The sense of not being prepared is slightly stronger in the rural counties.





The speed and magnitude of change associated with the Fourth Industrial Revolution (Industry 4.0) is likely to be greater than anything we have previously seen.

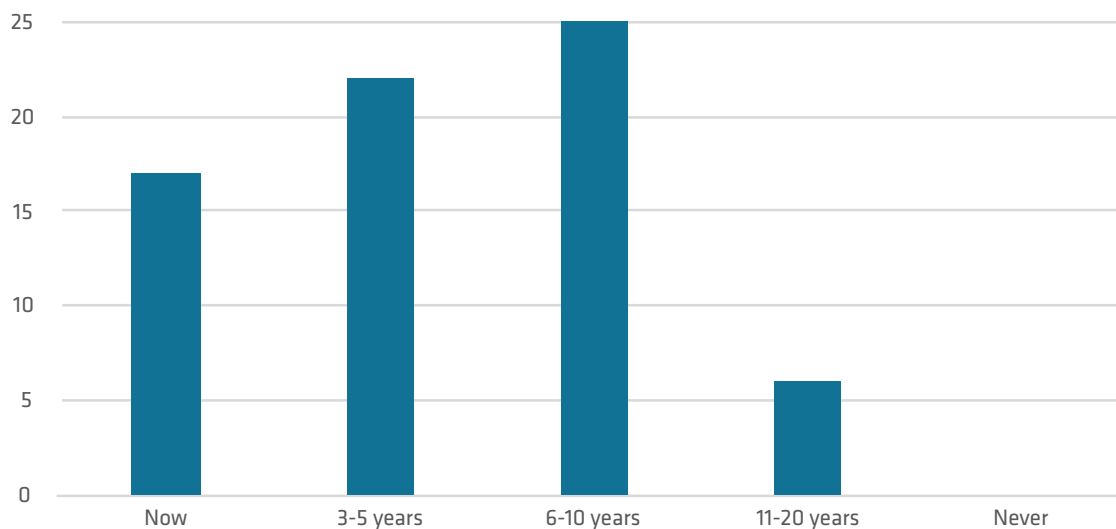
## 3.4 TIMING OF EXPECTED IMPACTS

During the Think-Tank, participants were asked to consider the potential future impacts of the following four topic areas as they relate to East Central Iowa. For each topic area, participants were polled on when they thought those topics would impact the region. Below are the results of the polling.

### 3.4.1 AUTOMATION, ROBOTICS, AND HIGH-TECH FARMING / MANUFACTURING

The Fourth Industrial Revolution (Industry 4.0) has brought with it an explosion of technological advances, some of which are catalytic to transformations taking place. Through groundbreaking technology, unprecedented processing power and speed, and massive storage capacity, data is being collected, harnessed and used in many ways. To gauge when Think-Tank participants thought these technological advancements would impact East Central Iowa, polling respondents were asked when they thought automation, robotics and high-tech manufacturing would significantly impact the regional economy.

#### When will automation, robotics, and high-tech farming/manufacturing significantly impact the regional economy?



DataInsight

#### DATA INSIGHTS:

- The majority of survey respondents indicated the effects of automation, robotics and high-tech farming/manufacturing would significantly impact the regional economy over the next 3-10 years.
- Approximately a quarter of all poll respondents indicated the significant effects of automation, robotics, and high-tech farming/manufacturing on the region are occurring now.

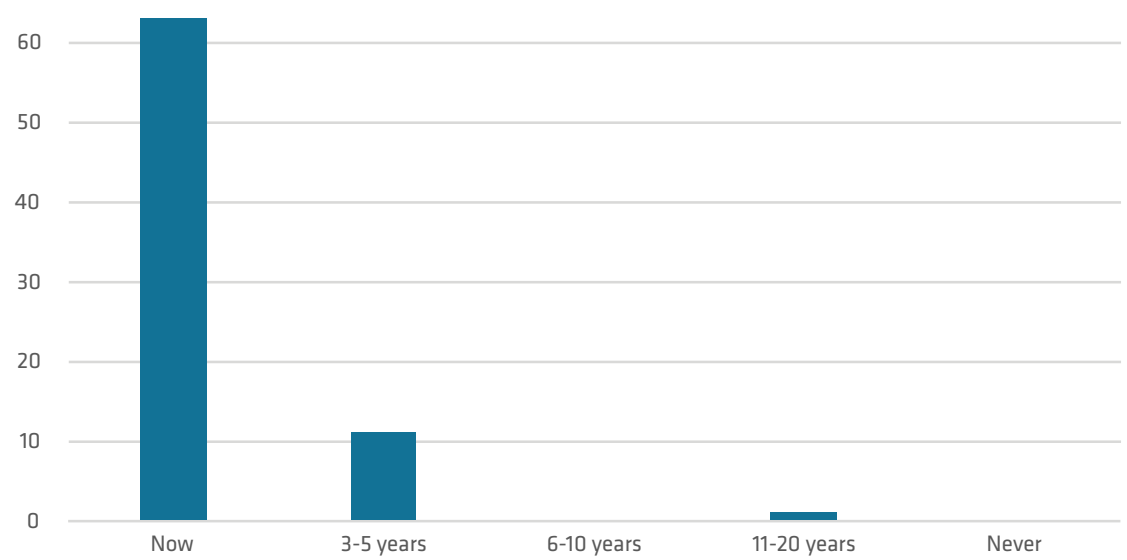


The Fourth Industrial Revolution has brought with it accelerated workforce changes. Combined with the global trends, these changes will require an intensely people-focused approach to economic and workforce development in Iowa.

### 3.4.2 WORKFORCE SKILLS SHORTAGE AND WORKPLACE TRANSFORMATION

Most regions today are experiencing severe constraint in similar areas and are applying the same workforce strategies towards workforce development. The two primary dynamics driving the workforce shortage in the United States are the exiting baby boomers and the increasing demand for STEM-skilled workers. The pandemic has accelerated many transformations in the workplace, making this an exciting time to explore new solutions in workforce development. To gauge the timing of these issues, respondents were asked when the workforce skills shortage and workplace transformation would significantly impact the regional economy.

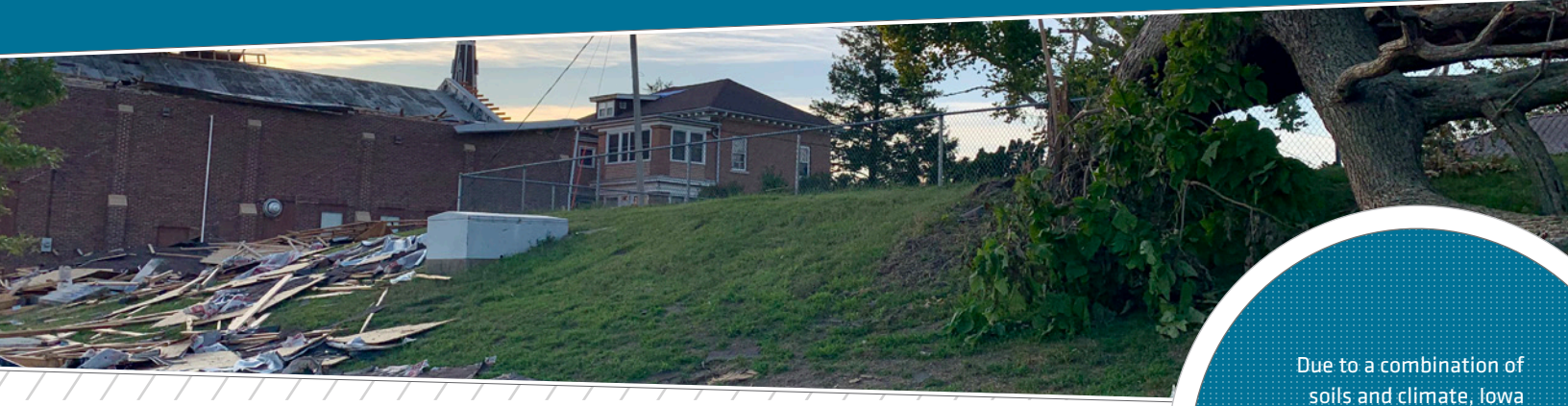
#### When will workforce skills shortage and workplace transformation significantly impact the regional economy?



#### DATA INSIGHTS:

- Approximately 84% of poll respondents indicated that workforce skills shortages and workplace transformation are significantly impacting the regional economy now, making these topics critical issues for East Central Iowa.
- Similar to the Think-Tank respondents, 89% of Stakeholder Survey respondents rated skills and talent gaps 6 or above on a 1-10 scale of importance (1 = not at all important; 10 = critically important)

DataInsight

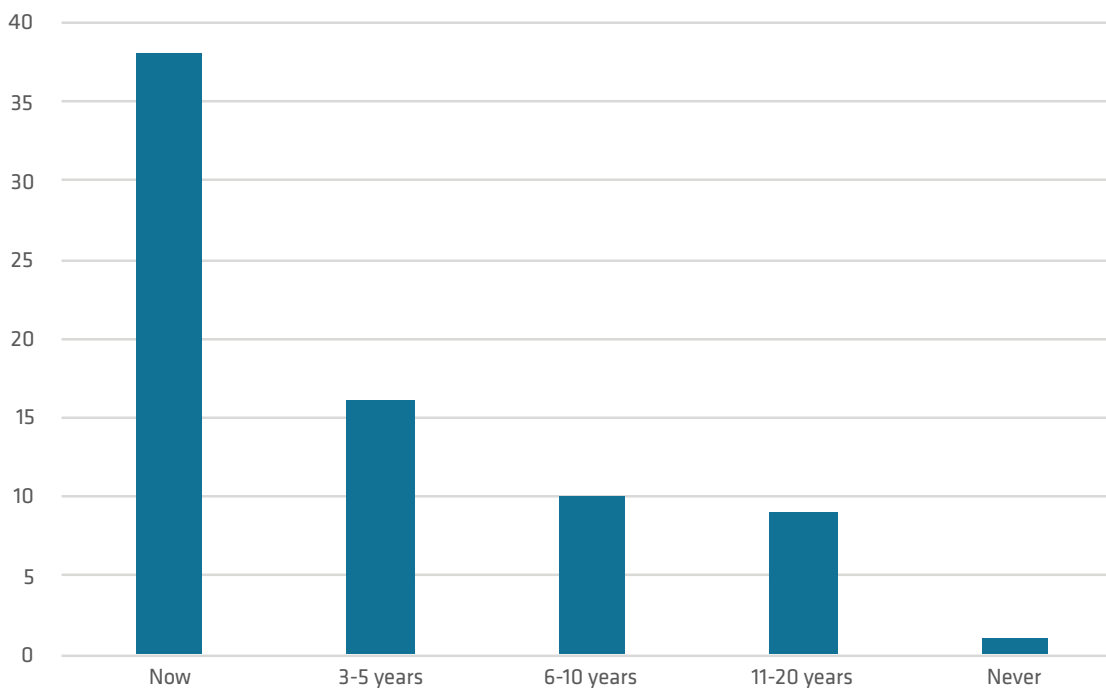


Due to a combination of soils and climate, Iowa can produce extremely high levels of food and biomass, potentially fueling significant new economic opportunities.

### 3.4.3 CHANGING WEATHER CONDITIONS AND PATTERNS

The reality of climate change is impacting all areas of the world. Having experienced a high-strength wind storm known as a derecho, East Central Iowa is only too familiar with these worsening patterns. Climate change has the potential to create an environment of scarcity and competition for our natural resources in the production of food. With its high concentration of biomass and water resources, Iowa will emerge as one of the most important food producing regions in the world. To gauge what Think-Tank participants thought about the timing of these impacts, respondents were asked when they thought changing weather conditions and patterns would significantly impact the regional economy.

#### When will changing weather conditions and patterns significantly impact the regional economy?



DataInsight

#### DATA INSIGHTS:

- 51% of poll respondents indicated that changing weather conditions and patterns are significantly impacting the regional economy now.
- 22% of poll respondents indicated that changing weather conditions and patterns will significantly impact the regional economy in 3-5 years, followed by 14% (6-10 years), 12% (11-20 years) and less than 1% (1 individual) indicating 'never.'



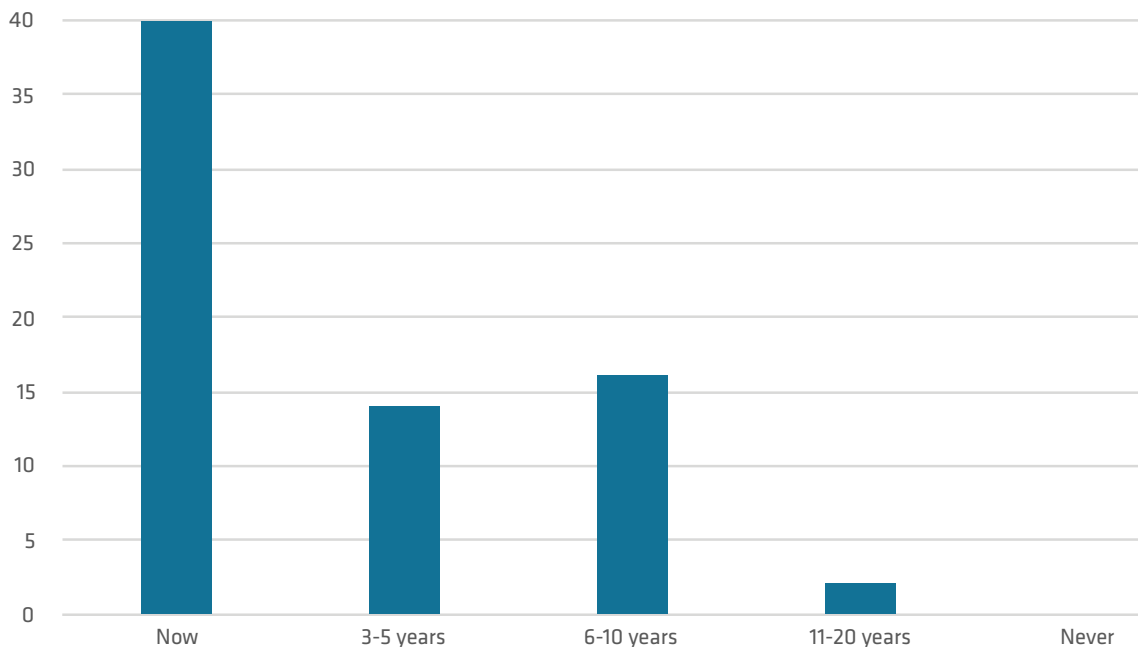


As consumers move through the aging process, changing societal values and consumer demands have direct impact on the goods and services that are produced.

### 3.4.4 CHANGING SOCIETAL VALUES AND CONSUMER DEMANDS

Through their purchase choices, consumers have the power to influence and drive changes in food and product production, processing, and supply chains. A shift to on-line purchasing has greatly affected retail and other industries. In developed markets, demands for safer and healthier foods and products are increasing. Responses such as local sourcing, fair trade, and organic produce are also becoming more rapidly commonplace. Consumers with abundant food sources and the financial means have greater opportunities to make educated decisions about their purchasing power and the products they buy. To gauge when these changing societal values might impact East Central Iowa, Think-Tank participants were asked when changing societal values and consumer demands would significantly impact the regional economy.

#### When will changing societal values and consumer demand significantly impact the regional economy?



#### DATA INSIGHTS:

- 56% of Think-Tank respondents indicated they thought changing societal values and consumer demands were significantly impacting the regional economy now, with 19% seeing the impact in 3-5 years and 22% in 6-10 years.
- Changing consumer demand has seen a significant shift in the housing market away from single-family home-ownership. According to a recent Morgan Stanley report (Aug 2019), millennials and gen z combined will drive demand for housing, particularly rentals. <https://www.morganstanley.com/ideas/millennials-generation-z-housing>

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An effective CEDS will leverage the educational opportunities that exist in East Central Iowa to support the strategies necessary for economic development in the region.

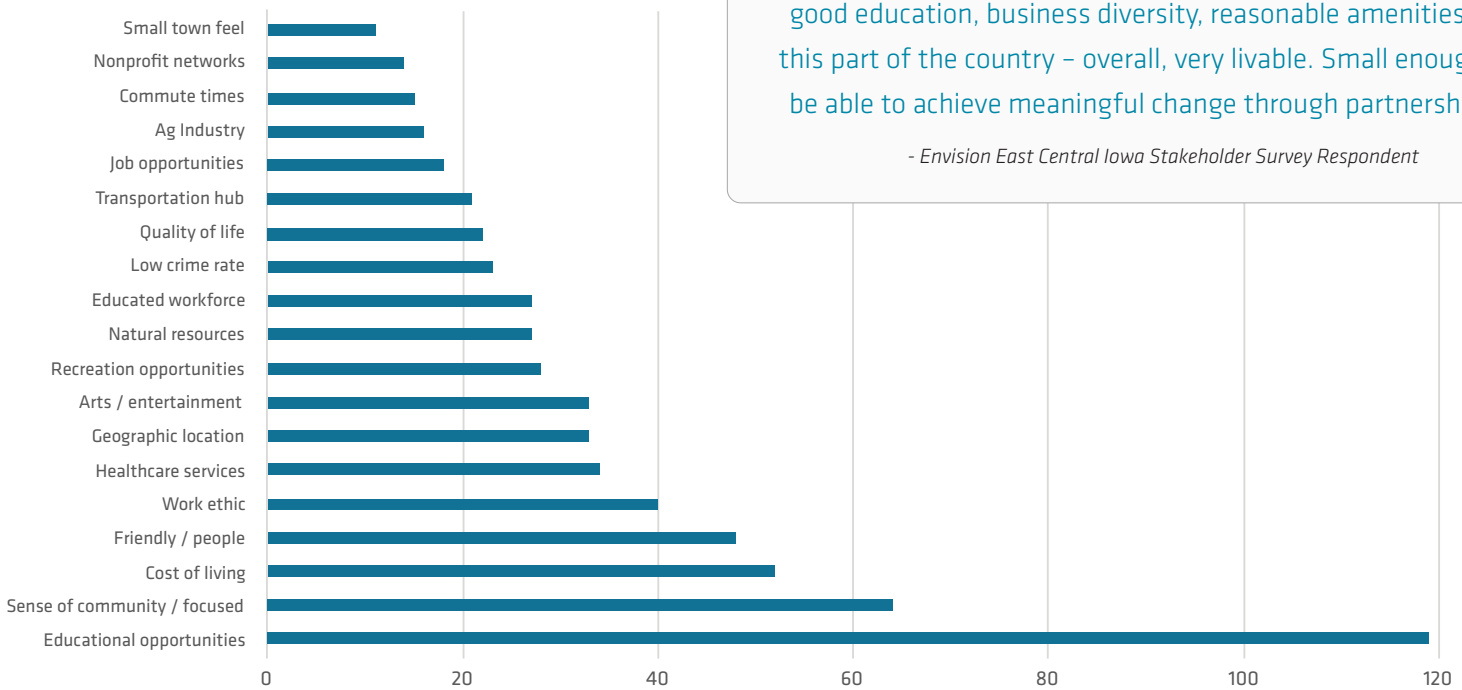
### 3.5 VIEWS OF THE FUTURE – SWOT ANALYSIS

The U.S. Economic Development Administration requires a SWOT analysis of the regional economy for all CEDS plans. The SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis is a strategic planning tool that ensures a clear objective informed by a comprehensive understanding of a region’s capabilities and capacity. A SWOT analysis identifies the region’s competitive advantages—those indigenous assets that make the region special or competitive in national and global economies—juxtaposed against those internal or external factors that can keep a region from realizing its potential. (EDA, 090820)

#### 3.5.1 EAST CENTRAL IOWA’S STRENGTHS

As a measure of what regional stakeholders consider East Central Iowa’s strengths, survey respondents were asked to identify the region’s strengths in narrative form. More than anything else, respondents considered the region’s educational opportunities its greatest strength.

##### What are East Central Iowa’s strengths? (n=265)



‘East Central Iowa is a good place to live; a combination of good education, business diversity, reasonable amenities for this part of the country – overall, very livable. Small enough to be able to achieve meaningful change through partnerships.’  
*- Envision East Central Iowa Stakeholder Survey Respondent*



##### DATA INSIGHTS:

- Survey results indicate that the human component is the backbone of the region.
- The region is seen to have very strong educational opportunities. The challenge is to convert this into retention of a skilled local workforce.

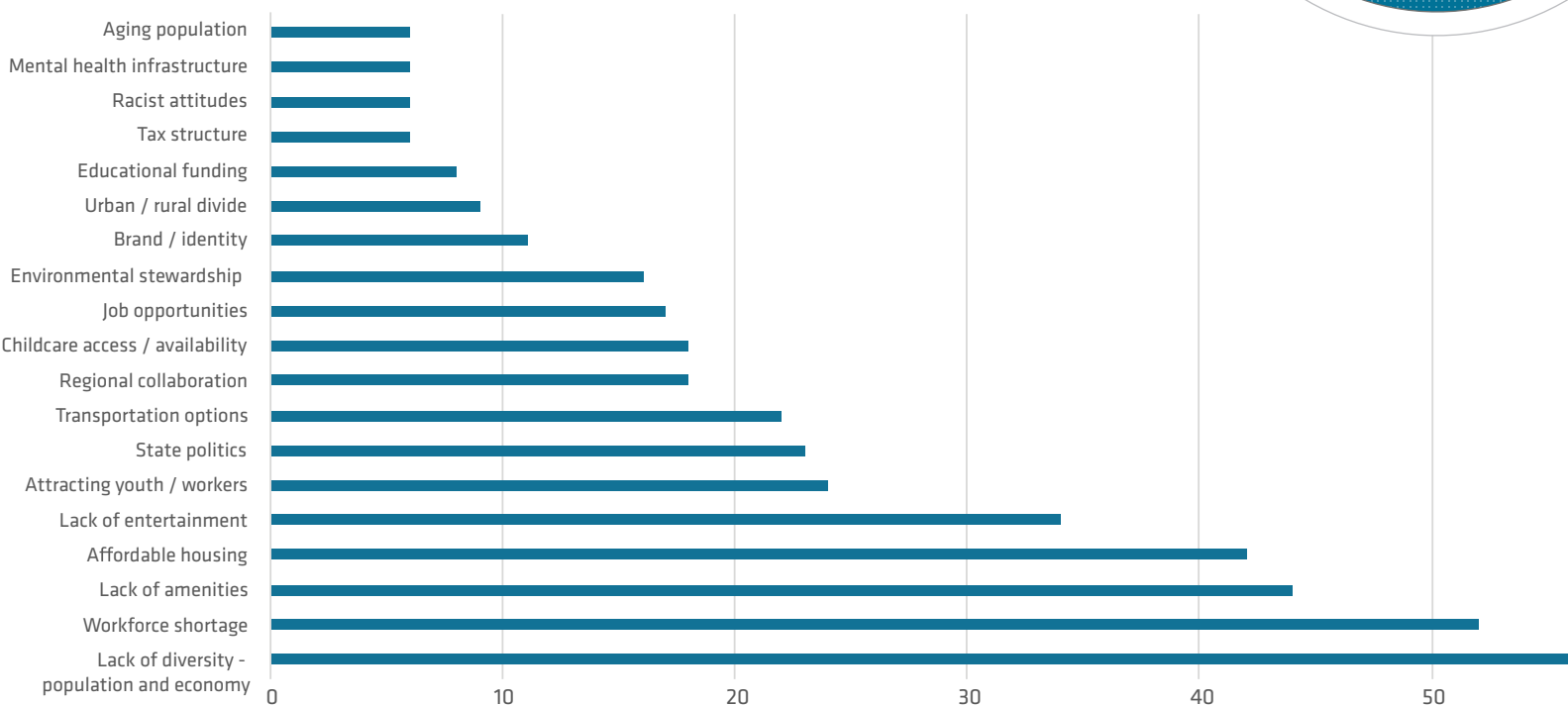


It is recognized by East Central Iowans that a pivot towards increased diversity in both population and the economy will be a critical element to changing the trajectory of the region's economic development.

### 3.5.2 EAST CENTRAL IOWA'S WEAKNESSES

As a measure of what regional stakeholders consider East Central Iowa's weaknesses, survey respondents were asked to identify the region's weaknesses in narrative form.

#### What are East Central Iowa's weaknesses?



“Lack of cultural diversity makes it difficult to attract and retain a diverse workforce.”

- Envision East Central Iowa Stakeholder Survey Respondent



#### DATA INSIGHTS:

- The critical weaknesses represent a bundle of issues that significantly impact the appeal of the region to new workers, migrants (from USA and abroad), and retention of locals.
- The opportunity is to re-envision the narrative of the region, and focus on the strengths and progress in critical areas.



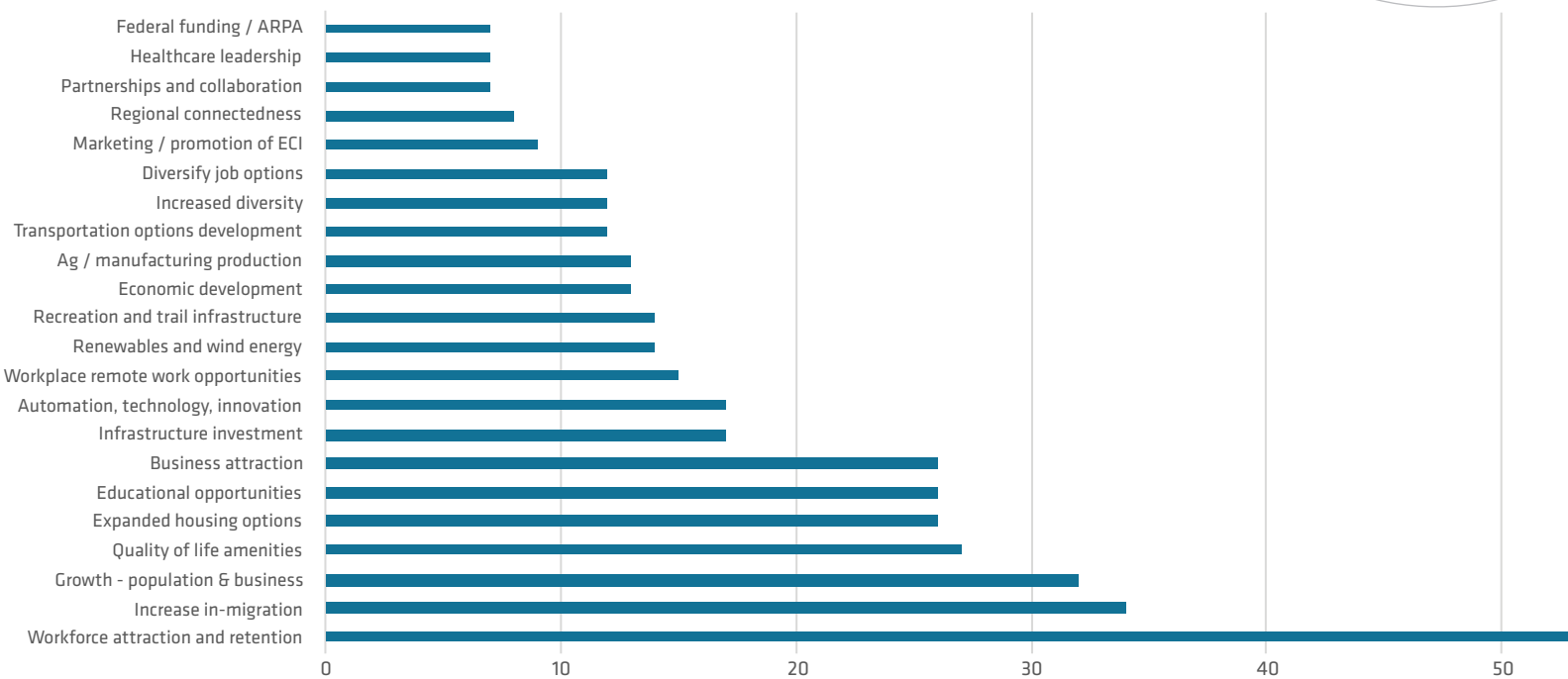


An effective CEDS will require leveraging the opportunities around workforce and workplace transformation in East Central Iowa.

### 3.5.3 OPPORTUNITIES FOR EAST CENTRAL IOWA

Survey respondents were asked to describe in narrative form what they believed were the greatest opportunities for the region in the next 5 years. Workforce attraction and retention was identified as the greatest opportunity, followed by increasing in-migration to support workforce demands.

#### What are the biggest opportunities facing East Central Iowa in the next 5 years?



“Shift to remote work opportunities for many companies offer two-fold benefit - increase our ability to attract employees from diverse backgrounds and locations without a relocation requirement, as well as the ability to attract remote workers to move to ECI without having to change jobs while taking advantage of low cost of living and area amenities.”

- Envision East Central Iowa Stakeholder Survey Respondent



DataInsight

#### DATA INSIGHTS:

- The opportunities represent the flip side of many of the issues identified as threats.
- As workplaces transform and more people work from home, remotely or in hybrid models, there may be new opportunities for the region to attract workers and talent.

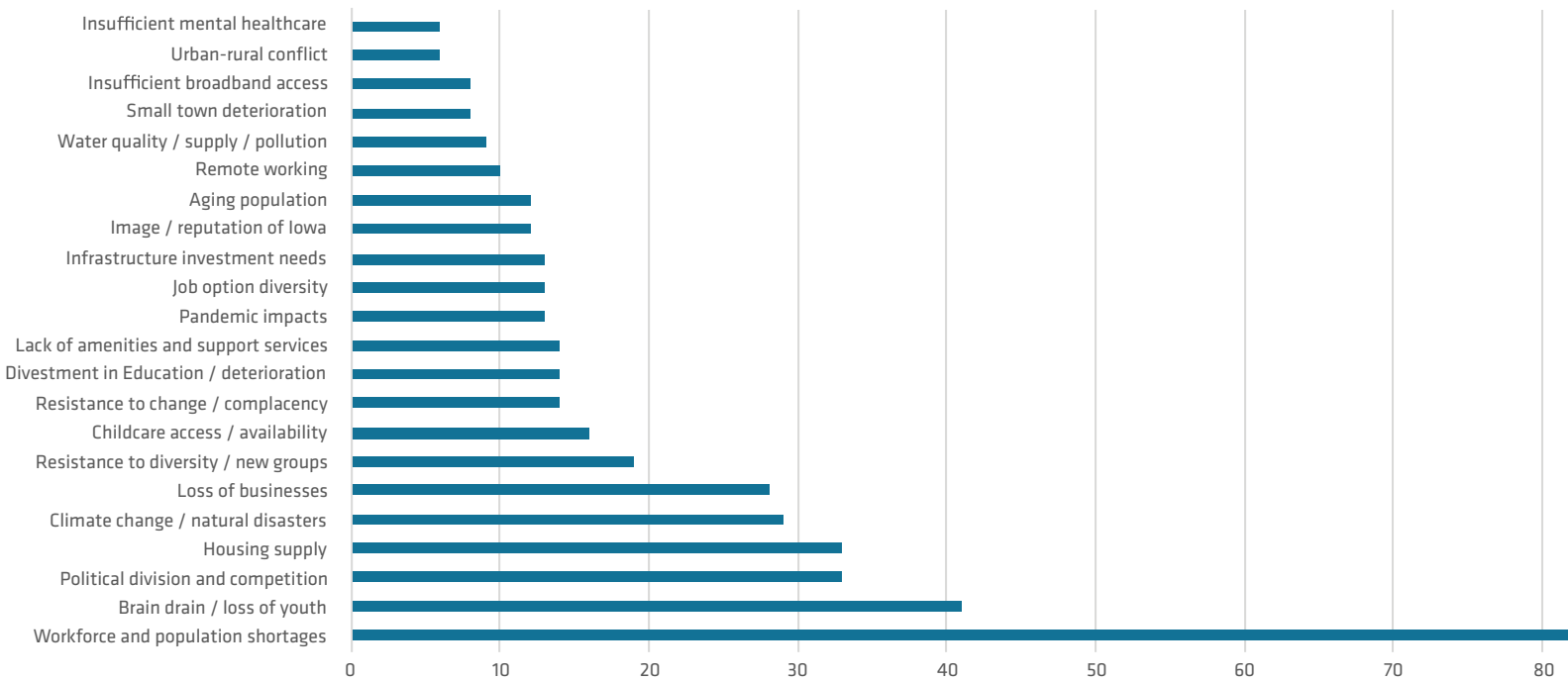


How East Central Iowa deals with workforce and workplace transformation is the critical future-splitting question for the region. A future-splitting question is one that propels a community in one direction or the other.

### 3.5.4 THREATS TO EAST CENTRAL IOWA

As a measure of where community stakeholders considered the East Central Iowa region unprepared or threatened by future impacts, survey respondents were asked to cite in narrative form what they believe are the biggest threats the region in the next 5 years. Survey results show significant concern with workforce and population shortages caused in part by a brain drain and loss in part by youth leaving the region

#### What are the biggest threats or challenges facing East Central Iowa in the next 5 years?



“Lack of workforce is the biggest challenge to East Central Iowa. The area can’t continue to bring new positions without growth in population to fill those positions. Change the work-space mindset.”

- Envision East Central Iowa Stakeholder Survey Respondent



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#### DATA INSIGHTS:

- The same core issues are reflected in the threats as in the weaknesses. The region will need a clear and articulated strategy to overcome these threats.



The scenario planning process allowed East Central Iowa stakeholders to examine the implications of choices about future economic development strategies for the region.

## 4.0 SCENARIO-BASED THINK-TANK

The five-hour Envision East Central Iowa scenario-based Think-Tank was conducted virtually on September 29, 2021. Approximately 122 people attended this workshop, including ECICOG staff, regional community members, industry experts, and agency representatives. The Think-Tank was intended to build coherency around a vision for regional future planning for East Central Iowa that will guide stakeholders over the next 5 years.

The scenario planning process provides a method to explore plausible futures and consider the implications of various future scenarios. The Think-Tank workshop aimed to:

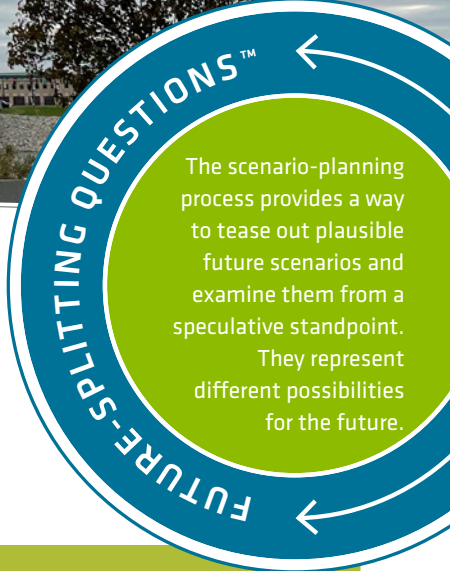
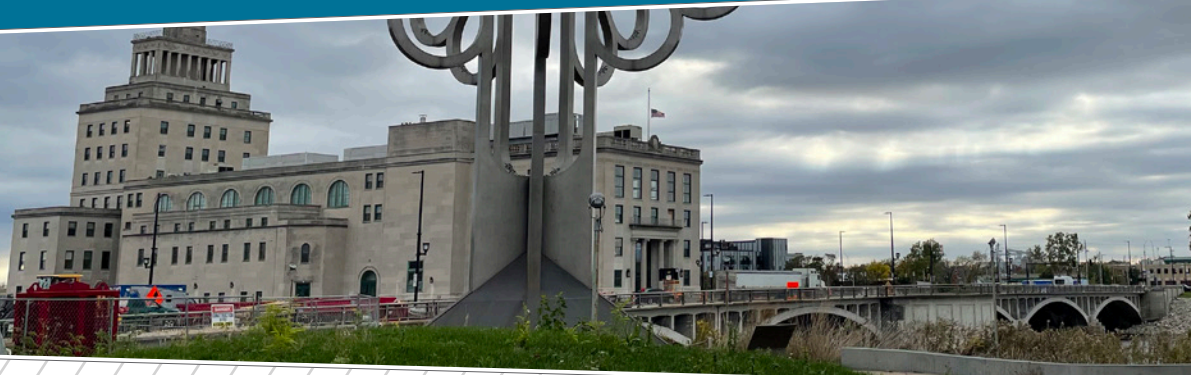
- Deepen the understanding and examination of how external events and local conditions could shape decision-making
- Identify and understand the key influences, trends, and dynamics that will shape the solid waste management and recycling looking out to 2030
- Create and describe four plausible long-term scenarios for the East Central Iowa region
- Explore alignment around a shared future vision
- Examine the strengths, weaknesses, opportunities and threats to East Central Iowa as perceived by community stakeholders

Think-Tank participants were guided through a scenario planning process to develop four plausible scenarios for East Central Iowa. The process involved exploration of local trends and forces of change; development of a scenario matrix defining four plausible scenario spaces for the future; and, the development of descriptive narratives of each scenario. The event concluded with discussion of the scenarios, selection of a preferred scenario, compilation of potential high-level strategic actions and the consequences of inaction.

The developed scenarios are important for providing a framework for discussing East Central Iowa's economic development strategies and associated possible outcomes and implications. In addition, the Think-Tank deliberations can assist in identifying key actions for the region and in exploring how various groups might collaborate to best contribute to future policymaking.



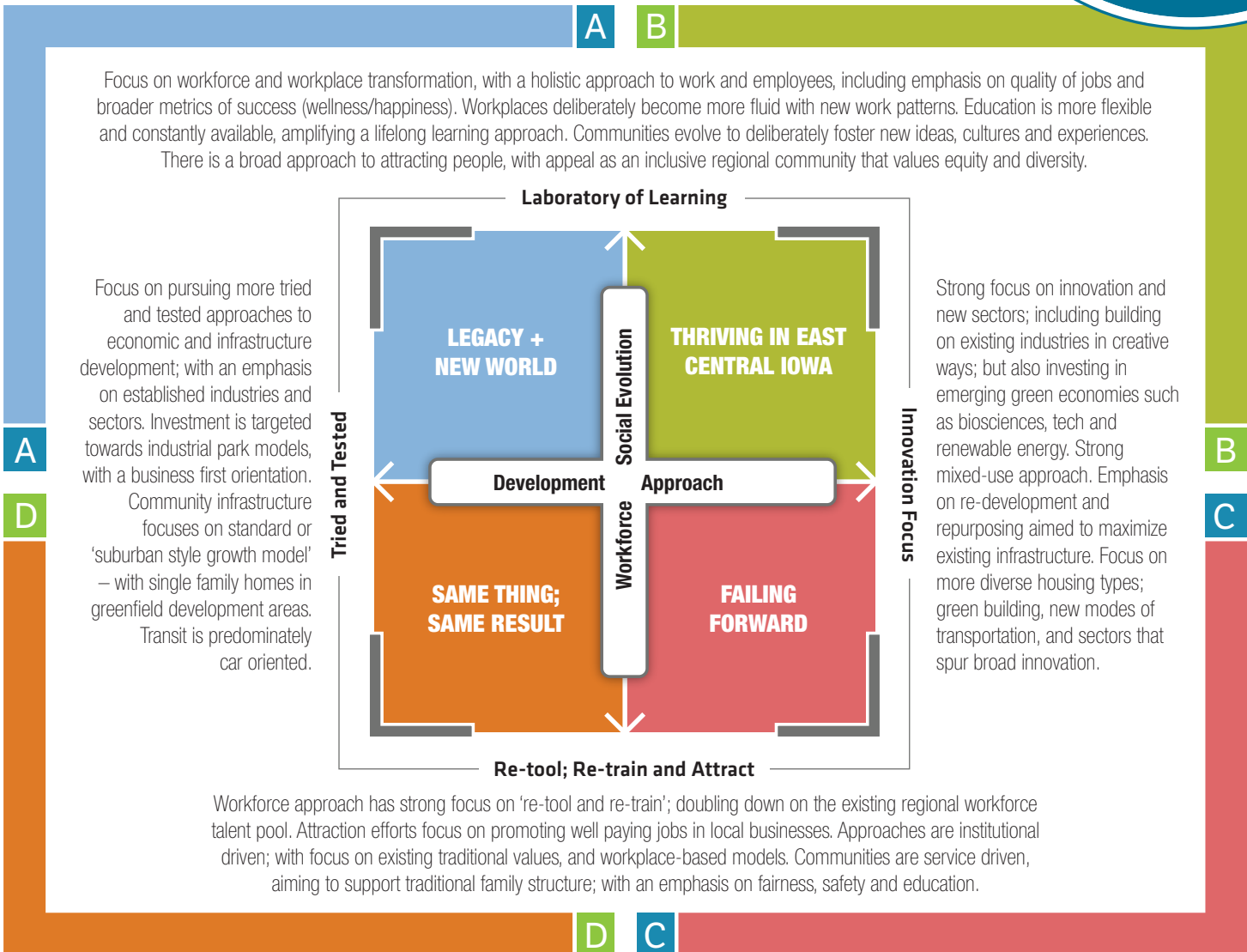




## 5.0 CREATING THE SCENARIO FRAMEWORK

Themes were identified for the two axes on the scenario matrix based on community survey responses, input from ECICOG staff, and discussions among the Strategy Committee. These themes were Development Approach and Workforce / Social Evolution.

The scenario-planning process provides a way to tease out plausible future scenarios and examine them from a speculative standpoint. They represent different possibilities for the future.

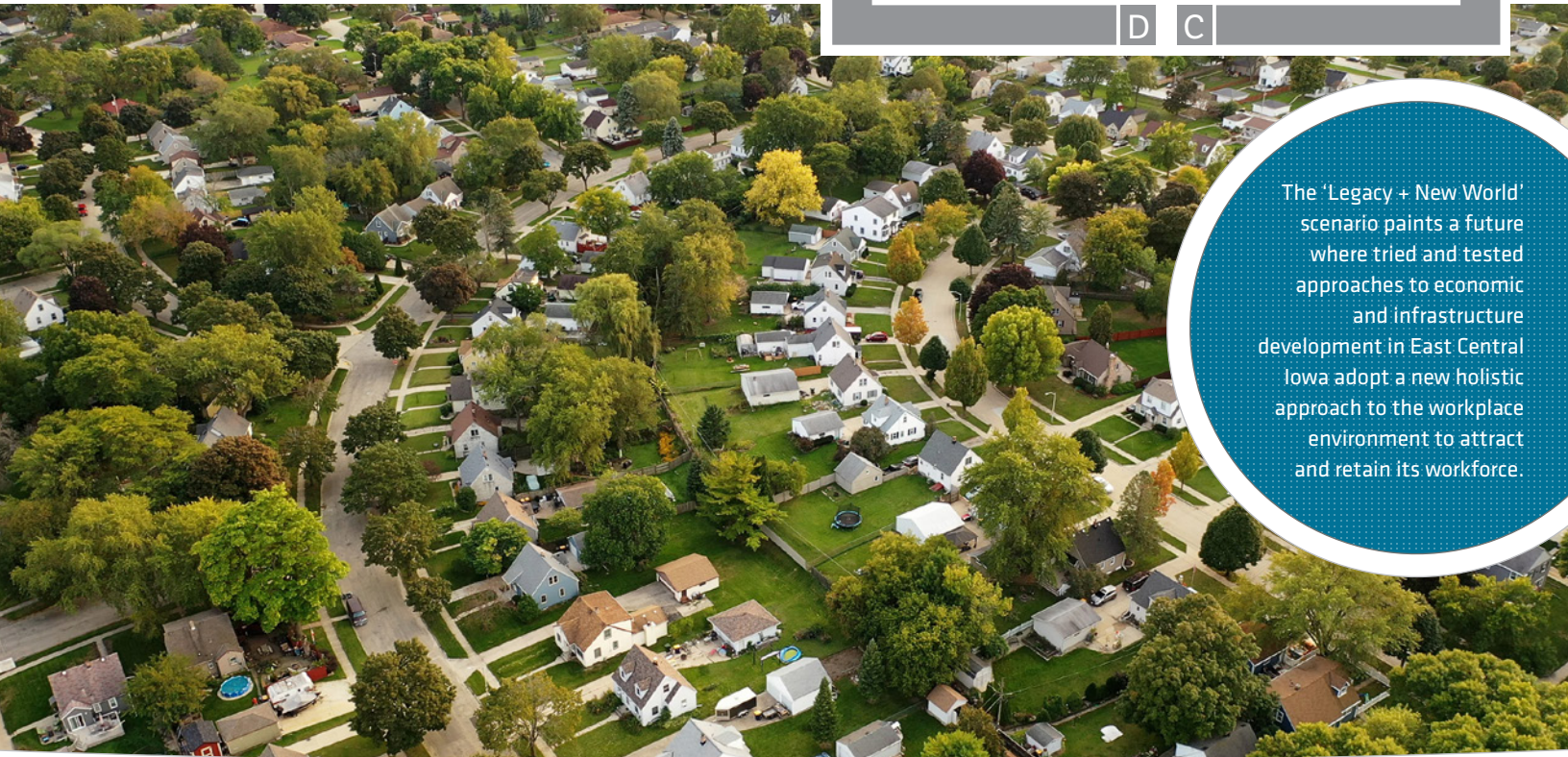
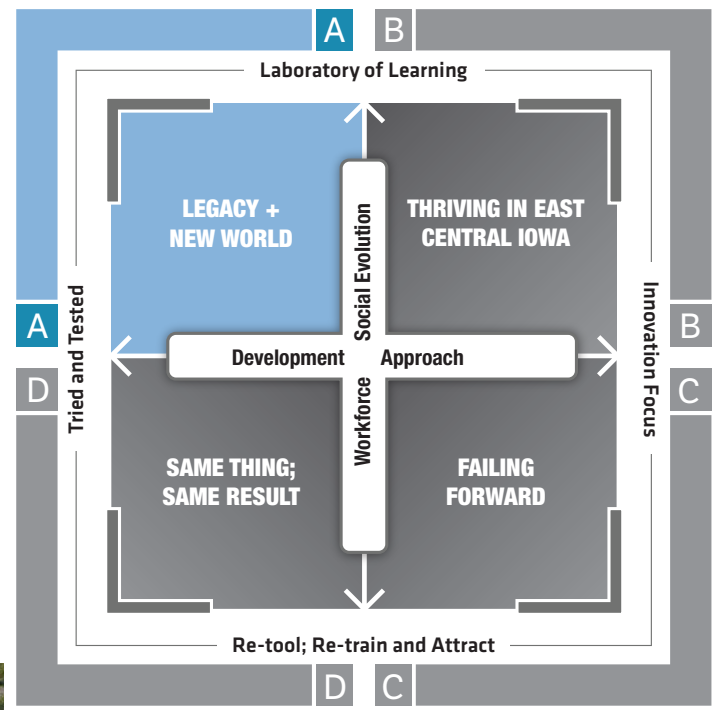






## 5.1 SCENARIO A: LEGACY + NEW WORLD

This scenario forecasts a future where the East Central Iowa economy is agriculture oriented and regional development follows successful tried and tested approaches to economic and infrastructure development. Existing industries thrive with industrial sprawl. Suburban sprawl and a dominating car culture continue as the predominant development models. Little is done to mitigate the impacts of these development patterns on the environment. More development means less land for agricultural purposes, and water becomes scarcer and more polluted. Supported by a workforce transformed by automation and modern workplace options, employers are relied upon to attract, train, and retain employees. A lifelong learning approach keeps workers employed, although some types of workers are marginalized as increased automation and digitization of production systems occur at a rapid pace.



The 'Legacy + New World' scenario paints a future where tried and tested approaches to economic and infrastructure development in East Central Iowa adopt a new holistic approach to the workplace environment to attract and retain its workforce.





In the 'Legacy + New World' scenario, continued suburban sprawl and industrial development over time restricts the agricultural sector and depletes the environment.

## SCENARIO A CHARACTERISTICS: LEGACY + NEW WORLD – 2030

The characteristics of this scenario paint a future where continuation of the same tried and tested development approach to the regional economy and infrastructure over time increases suburban sprawl and environmental decline. Quality of life, flexible workplace options, and access to land and resources initially attract people to the region. However, the lack of business types discourages entrepreneurs, and young people leave for more vibrant industrial and social ecosystems.



### Economic Characteristics

**Slow and steady growth with emphasis on established industries and sectors.**

- High dependence on employers to teach, train, transport, and build out infrastructure.
- Development of industrial parks and suburban sprawl continues.
- Limited mix of business type, size, and age hinders expansion of opportunities for employment.



### Workforce and Social Characteristics

**The region has difficulty attracting and retaining workforce levels needed to support industries.**

- Workplace offers more remote working, automation, and untraditional options.
- Automation displaces people and perpetuates disparities in learning opportunities.
- Traditional barriers to lifelong learning continue: Broadband, transportation, childcare, housing access and affordability.



### Environmental Characteristics

**Region continues to be an agricultural economy and retains the same development patterns.**

- Quality of life and access to land and water attracts people to the region.
- Continuation of current development patterns negatively impacts land and water resources.
- Suburban-style growth necessitates efforts to minimize environmental impacts and protect ecosystems.

#### 2022 HEADLINE NEWS:

'Employers ask: Where are all the workers?'



#### 2025 HEADLINE NEWS:

'Companies are compelled to support buses to run long and more days and to invest in broadband.'



#### 2030 HEADLINE NEWS:

'Record economic growth with not a person in sight / volunteer organizations collapse.'

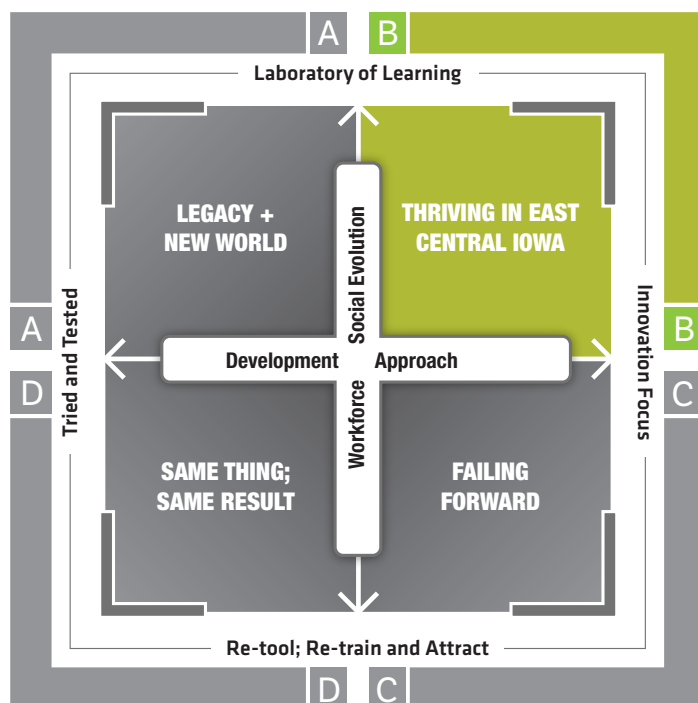






## 5.2 SCENARIO B: THRIVING IN EAST CENTRAL IOWA

This scenario forecasts a future where the approach to development is highly focused on innovation and new sectors, building existing industries in creative ways, and investing in green economies. Emphasis is on re-development and repurposing aimed at maximizing existing infrastructure with a mixed-use approach. More diverse housing types emerge along with green building. New modes of transportation spur broad innovation across sectors. Services and goods meet the consumer ‘where they are’ and research conducted by local educational institutions and private industries increase revenue-generating businesses. Workforce and workplace are transformed, emphasizing job quality and incorporating broader metrics of success to include wellness/happiness. The region’s rural and urban strengths are celebrated and promoted to connect with youth and keep them from leaving. An emphasis on regional inclusivity attracts people that value equity and diversity to the region.



The 'Thriving in East Central Iowa' scenario paints a future where the strengths of urban and rural lifestyles in East Central Iowa are celebrated and promoted.



In the 'Thriving in East Central Iowa' scenario, the workplace and regional community are transformed into laboratories of learning to support innovation in all sectors and the built and natural environments thrive.

## SCENARIO B CHARACTERISTICS: THRIVING IN EAST CENTRAL IOWA – 2030

The characteristics of this scenario paint a future where East Central Iowa transforms itself into an innovative, inclusive, and sustainable regional economy. Communities evolve to deliberately foster new ideas, cultures, and experiences. The region's quality of life becomes a magnet for those leaving the Coasts and the South.



### Economic Characteristics

**Strong focus on innovation, new industry sectors, and mixed-use approach.**

- New and unique industries are supported such as hemp, clean energy, etc.
- Electrification of technologies occurs, and high-speed broadband is considered a public utility; access for all.
- More public-private partnerships emerge to support growth.



### Workforce and Social Characteristics

**Workplace, education, and communities evolve to become laboratories of learning.**

- State and local policies reflect a welcoming tone to all populations.
- Workplace is transformed to allow lifelong learning, flexible work schedules, and remote work.
- Transportation nodes and modes are redefined for efficiency and connectivity.



### Environmental Characteristics

**Green building, new transportation modes, and innovation are emphasized.**

- Net-zero waste and net-zero homes are the standard.
- Innovation in construction materials and processes leads to greener and more efficient developments.
- Waterways are cleaner and water resources are protected.

#### 2022 HEADLINE NEWS:

'East Central Iowa delivers new strategic plan for the region.'



#### 2025 HEADLINE NEWS:

'Every high school student has a workplace experience before graduation.'



#### 2030 HEADLINE NEWS:

'Iowa leads by 100% renewable power.'

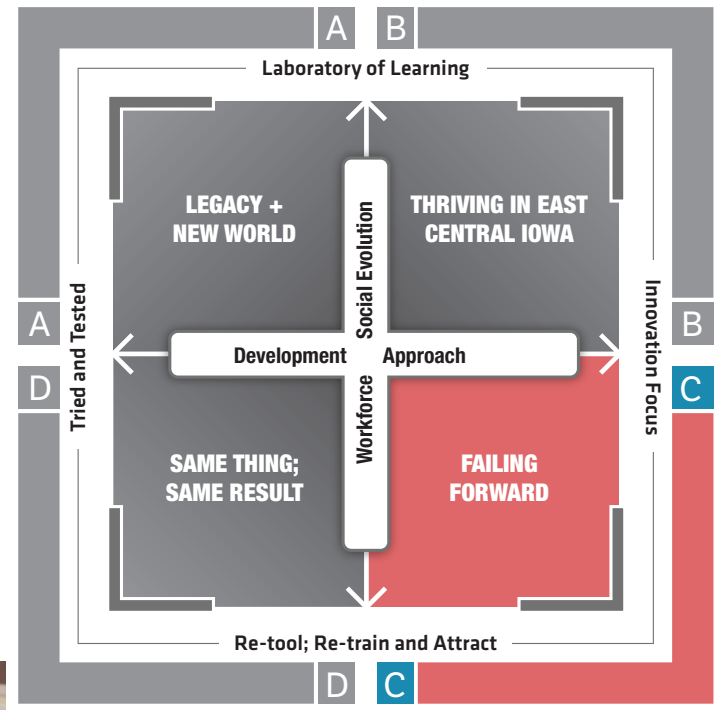






### 5.3 SCENARIO C: FAILING FORWARD

This scenario forecasts a future where a strong focus on innovation and new industry sectors and economies creates a growing need for new talent. A synergistic relationship develops between the business and the education systems, and the workforce pipeline is grown and tailored to regional needs. Approaches are institutionally- driven with a focus on existing traditional values and workplace-based models. Attraction efforts focus on promoting well-paying jobs in local businesses. A supportive business climate fosters small start-ups and entrepreneurship, but many fail with the inward-looking regional approach to talent support and development. Larger innovative companies also struggle to compete for new talent. Younger workers are drawn outside the region to businesses and industries that are more flexible and are welcoming to alternative lifestyles.



The 'Failing Forward' scenario paints a future where an inward-looking approach to workforce and social development cannot keep up with the demands of industry and its workers.





In the 'Failing Forward' scenario, the local workforce is highly educated and skilled, but not enough to support growing innovation and over time forces companies to move elsewhere.

## SCENARIO C CHARACTERISTICS: FAILING FORWARD – 2030

The characteristics of this scenario paint a future where a strong innovation focus to development provides a solid foundation for new ideas and entrepreneurship across industries. Businesses use a 're-tool, re-train, and attract' approach to workforce development by doubling down on the existing regional talent pool. Over time, this orientation does not attract talent from outside the region and business struggle to find talent that will stay.



### Economic Characteristics

**A strong innovation focus supports East Central Iowa's welcoming business environment.**

- Existing business segments grow and entrepreneurship thrives.
- Targeted assistance is provided to existing businesses to innovate, retool, and retrain.
- Many small starts occur; many failures as well as businesses struggle to find diverse workforce skillsets.



### Workforce and Social Characteristics

**Workforce development is focused on reskilling and retention. Society maintains traditional values and structures.**

- Businesses struggle as workforce leaves for a broader range of workplace options.
- Communities support traditional family structure with emphasis on safety, fairness, and education.
- Workforce development focuses on the regional talent pool to re-tool and re-train, so those seeking jobs are likely to find one.



### Environmental Characteristics

**Innovation spurs green building, multi-modal transportation, and agricultural diversity.**

- Public transit grows with higher frequency and connections across the region.
- Redevelopment and repurposing of existing infrastructure benefits regional environment.
- Emerging green economies thrive with well-paying jobs, but over time retract due to lack of workforce talent.

#### 2022 HEADLINE NEWS:

'Workforce needs becoming critical for the region.'



#### 2025 HEADLINE NEWS:

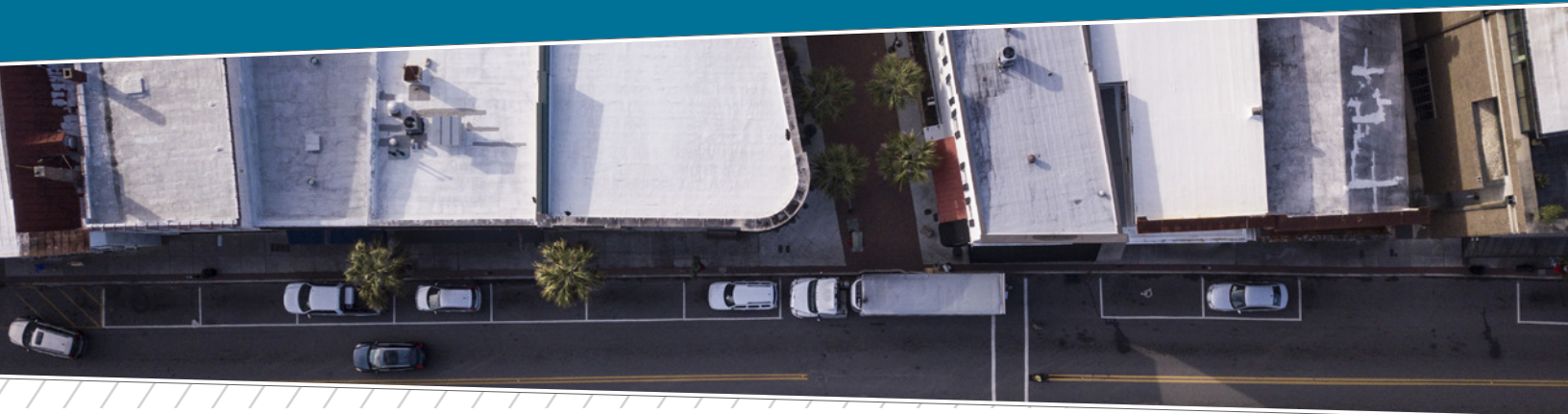
'Failing forward propels Iowa innovation to a new height.'



#### 2030 HEADLINE NEWS:

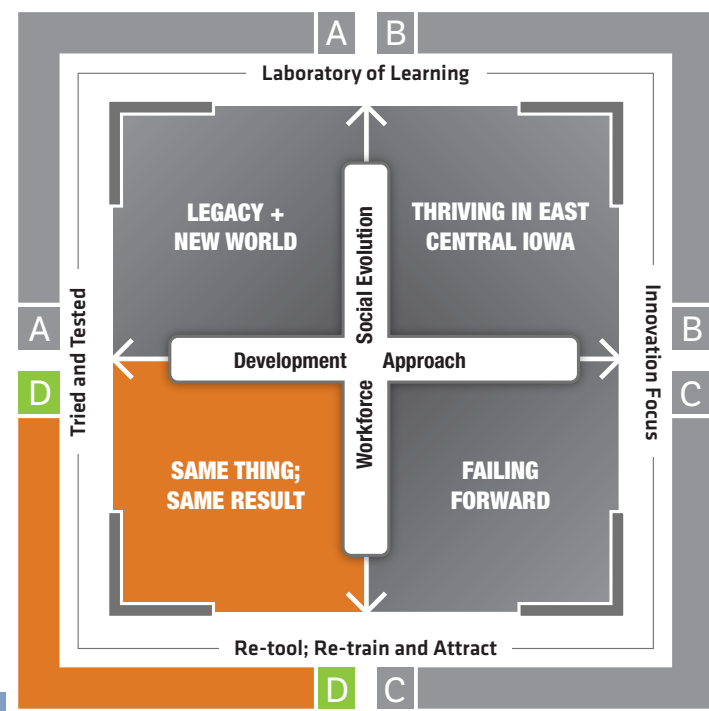
'The region becomes #1 desired USA location for families to live.'





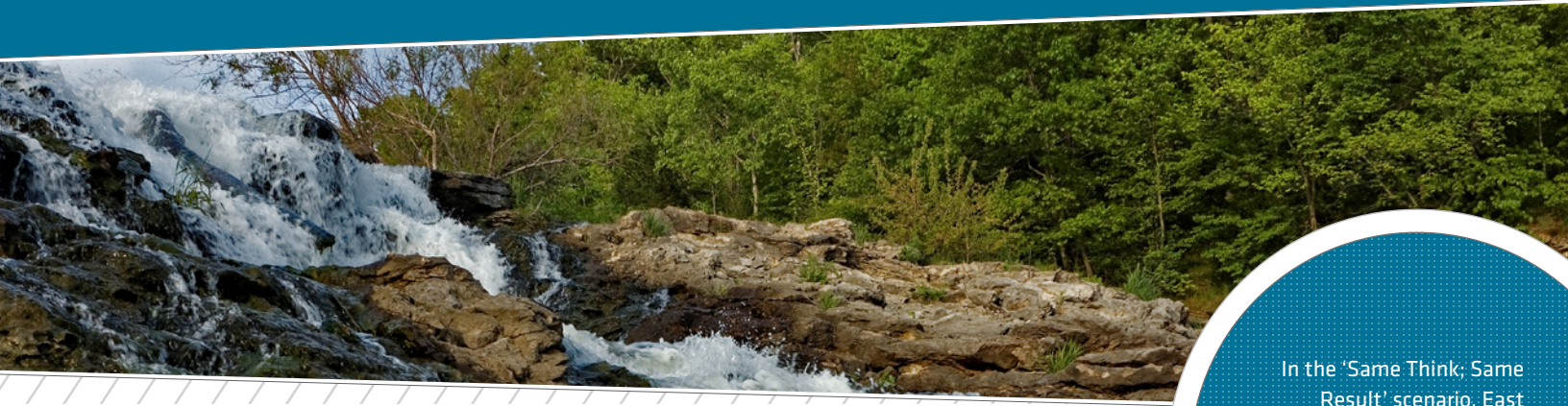
## 5.4 SCENARIO D: SAME THING; SAME RESULT

This scenario forecasts a future where economic and infrastructure development in the region continues on as it always has. Emphasis on tried and tested industries continues investments targeted towards industrial park models, with a business-first orientation. The combination of industry and agriculture provides a solid base for employment, but the lack of diversity in business discourages innovation and entrepreneurship. Institutionally-driven workforce needs dominate employment creation and the region begins to operate in a silo. Lack of investment in technology and automation to support workforce demand forces local headquarters for businesses to relocate. Traditional social structures and suburban housing discourage new talent from moving to the region, and East Central Iowa gains a reputation for being an unwelcoming bubble.



The 'Same Thing; Same Result' scenario paints a future where the status quo gradually erodes the social fabric of East Central Iowa and the landscape is dominated by big industry.





In the 'Same Think; Same Result' scenario, East Central Iowa cannot keep up with infrastructure and workforce demands and the region loses its competitive edge.

## SCENARIO D CHARACTERISTICS: SAME THING; SAME RESULT – 2030

The characteristics of this scenario paint a future where challenges occur on all fronts. Traditional approaches to economic, infrastructure, and workforce development cause East Central Iowa to lose its competitiveness and fall behind other regions. Over time, quality of life and the regional environment degrade and young people leave for more flexible and accepting ecosystems.



### Economic Characteristics

**Traditional industry and agriculture are the predominant economic drivers.**

- Businesses are required to automate to keep up with workforce demand.
- Cities continue to sprawl with little regulation, and it is difficult to keep up with infrastructure needs.
- Affordable housing reaches a crisis point and local business headquarters relocate outside the region.



### Workforce and Social Characteristics

**There is a workforce shortage and vulnerable populations suffer.**

- Younger generations move away to pursue other job opportunities.
- Service providers are burned out due to the needs of community members; suicide rates climb.
- Role of education is decreased; college enrollments decrease and high schoolers go into more trades.



### Environmental Characteristics

**The environment degrades as the carbon footprint is increased.**

- Regional healthcare costs rise due to nitrates in water, etc.
- Streetscaping and flood management increase in importance to combat environmental degradation.
- Traditional farming practices continue to aid in soil erosion and watershed contamination.

#### 2022 HEADLINE NEWS:

'Certified site development at an all-time high.'



#### 2025 HEADLINE NEWS:

'Millennials flee coasts to Minnesota and Illinois but skip Iowa!'



#### 2030 HEADLINE NEWS:

'Water, water everywhere, but not a drop to drink!'





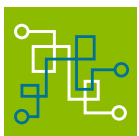
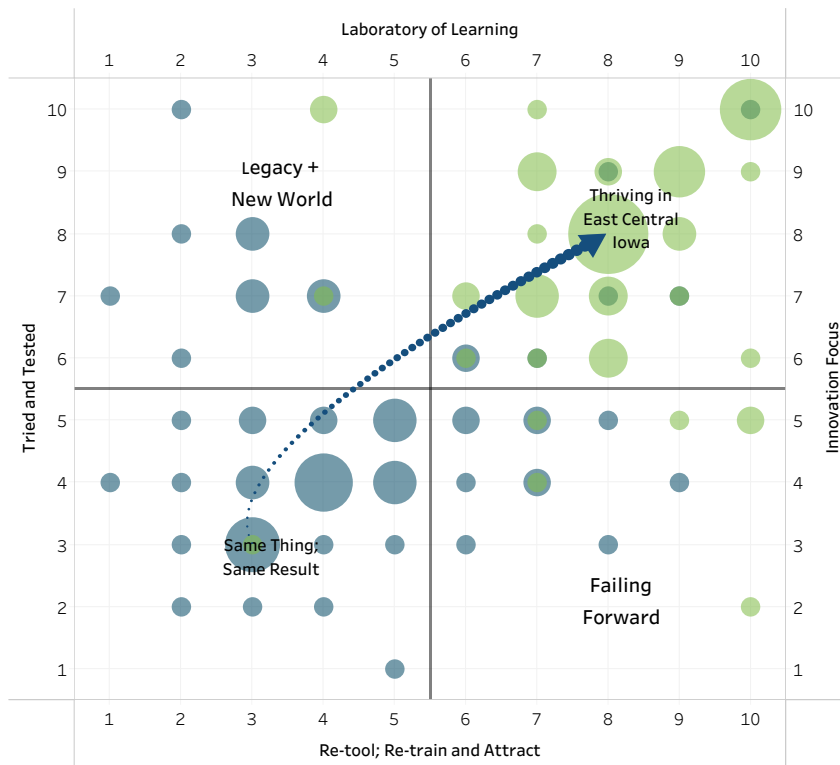


The preferred future, 'Thriving in East Central Iowa,' outlines the basis of a shared vision for the region. The trajectory from expected to preferred future constitutes the strategic actions needed to make this vision become a reality.

## 6.0 EXPECTED AND PREFERRED FUTURES

Think-Tank participants took an Expected and Preferred Survey that included two questions about the trajectory of East Central Iowa. The first question was about the expected future – the future deemed most likely to happen if there is no change in the current trajectory of East Central Iowa. Workshop participants responses varied, but generally indicated they believed that Scenario D, “Same thing; same result,” is the scenario they believed most represented the current direction for East Central Iowa. The second question was about the preferred or most desired, future. While participants viewed each scenario as plausible, they expressed a clear preference for Scenario B: ‘Thriving in East Central Iowa.’

### Expected X Preferred Future - All Data



FutureInsight

### FUTURE INSIGHTS:

- A definite preference for the ‘Thriving in East Central Iowa’ scenario indicates a clear call for regional stakeholders to take actions to support that vision for the future.
- There is clear distance between the expected and preferred futures of East Central Iowa. This means a combined focus: adopting a more innovative approach to economic and infrastructure development, and adopting a more holistic, equitable, and inclusive approach to workforce and workplace transformation.



The sense of urgency reflected by survey respondents gives East Central Iowa regional stakeholders a clear mandate to institute change quickly as the region seeks to achieve its preferred future.

## 6.1 URGENCY TO IMPLEMENT THE VISION

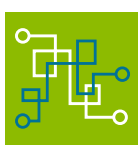
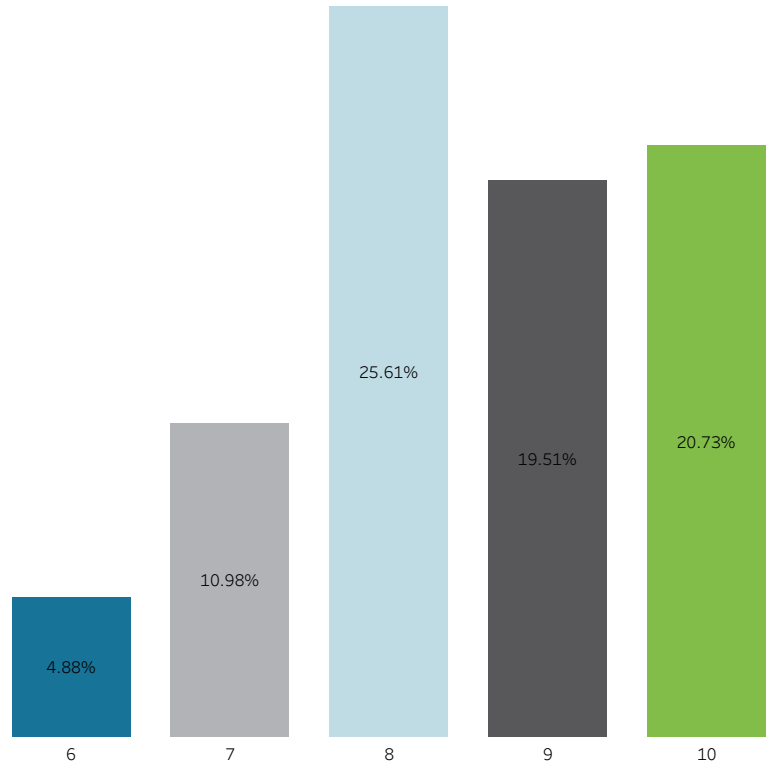
The survey conducted towards the end of the Think-Tank explored the perceived sense of urgency to implement the preferred future. The results indicate a significant desire to move with urgency.

### Sense of Urgency

Question: *How quickly do you think stakeholders need to adopt and pursue strategies to achieve the preferred vision?* Scale: 1 = Not urgent right now; 10 = Critically urgent right now



1                      2                      3                      4                      5                      6                      7                      8                      9                      10



### FUTURE INSIGHTS:

- Participants who took the survey rated the urgency of adopting and pursuing the vision in the 6-10 scoring range (Urgent to Critically Urgent).
- The sense of urgency highlights the intensity of challenge that regional stakeholders are experiencing. These challenges are unlikely to go away in the short or medium term.



## 7.0 POTENTIAL HIGH-LEVEL STRATEGIC ACTIONS

Think-Tank participants were divided into 7 groups to brainstorm potential strategies to place East Central Iowa on the trajectory toward the preferred vision for the region. The high-level strategies developed by the groups are summarized below within the framework of the scenario axes, 'Development Approach' and 'Workforce / Social Evolution.'

### High-level strategic action ideas – Think Tank brainstorming summary

	DEVELOPMENT APPROACH	WORKFORCE / SOCIAL EVOLUTION
Group 1	<ul style="list-style-type: none"> <li>• Confirm all regional Economic Development Organizations are on board</li> <li>• Communicate at the state level for support</li> <li>• Invest in available and affordable housing in each community footprint</li> <li>• Rethink Transportation and build a 'model' system</li> </ul>	<ul style="list-style-type: none"> <li>• Expand pool of qualified applications</li> <li>• Build pipeline of individual training for high-demand jobs</li> <li>• Evaluate and plan for needed future skills</li> <li>• Be more inclusive in recruitment and hiring, including immigrants and refugees</li> <li>• Understand and respond to labor participation trends</li> </ul>
Group 2	<ul style="list-style-type: none"> <li>• Create positive regional narrative around placemaking to share with Midwest and nation</li> <li>• Advocate for and create plan for zero waste and clean energy goals</li> <li>• Strengthen school -to-workforce/business pipeline</li> </ul>	<ul style="list-style-type: none"> <li>• Upskill/reskill in hard and soft skills; use public schools for adult education</li> <li>• Incorporate immigrants and refugees into workforce quickly</li> <li>• Balance work culture life / allow more flexibility</li> <li>• Get to kids early so can dream big; help them understand importance of quality of life</li> <li>• Ensure childcare availability</li> </ul>
Group 3	<ul style="list-style-type: none"> <li>• Increase public-private partnerships (incentivize behavior)</li> <li>• Align policies with desired outcomes</li> <li>• Focus on long game with intentionality (ecosystem change)</li> <li>• Strengthen connection between industry and education</li> <li>• Reprioritize investment in pedestrian-first transportation</li> <li>• Incentivize innovation</li> </ul>	<ul style="list-style-type: none"> <li>• Support grassroots movements and diversity of voices</li> <li>• Build varied housing stock supported by zoning policies</li> <li>• Advocate for change in student debt</li> <li>• Allow for greater diversity</li> <li>• Expand childcare infrastructure</li> <li>• Create development programs that are inclusive</li> </ul>
Group 4	<ul style="list-style-type: none"> <li>• Create a communications framework for the region that promotes urban/rural benefits</li> <li>• Build protections for our unique resources</li> <li>• Match infrastructure needs with lifestyles</li> </ul>	<ul style="list-style-type: none"> <li>• Promote partnerships between urban and rural areas to attract jobs and growth</li> <li>• Develop shared goals and communicate those goals well and carefully</li> </ul>





	DEVELOPMENT APPROACH	WORKFORCE / SOCIAL EVOLUTION
Group 5	<ul style="list-style-type: none"> <li>Leverage innovation from existing businesses/organizations to drive change</li> <li>Determine how to incentivize businesses to innovate</li> <li>Develop a strategy that focuses on 4-5 goals to move toward scenario B, determine capacity of different organizations and develop a system of accountability for the goals (metrics for success)</li> </ul>	<ul style="list-style-type: none"> <li>Invest in human infrastructure; develop a diverse and equitable workforce</li> <li>Determine what is motivating the change we seek and understand why we are headed to scenario D</li> <li>Recognize that existing systems have bias which need to be addressed</li> <li>Find ways to develop collective impact and don't let the perfect be the enemy of the good</li> </ul>
Group 6	<ul style="list-style-type: none"> <li>Foster innovation; invest in entrepreneurship, find financing, build relationships with private equity markets</li> <li>Provide assistance to businesses or human resources departments who need help rethinking work or workplace policies to address needed changes</li> <li>Expand school/business partnerships</li> </ul>	<ul style="list-style-type: none"> <li>Reinvent workforce models</li> <li>Transform what school means; provide internships</li> <li>Expand childcare; include schools and workplace</li> <li>Increase housing options and resources to revitalize neighborhoods and communities</li> <li>Customize and provide options for how people live (housing, transportation, etc.)</li> </ul>
Group 7	<ul style="list-style-type: none"> <li>Invest in wind and solar; engage private sector and use data to convince legislators</li> <li>Increase eligibility for innovation funding; work out comprehensive plan with urban and rural</li> <li>Increase broadband strength in the region</li> <li>Infrastructure investments that support quality of life and density; revise zoning</li> </ul>	<ul style="list-style-type: none"> <li>Provide upskilling to support innovation</li> <li>Provide support and education to local and state-wide elected officials about needed changes to infrastructure</li> <li>Provide robust childcare including 24/7 availability; develop regional plan; develop childcare trades program; reimagine old big box stores/others that could be repurposed into childcare training labs for workforce</li> </ul>

“This is very exciting for anyone that enjoys traveling or needs to travel for their job/business. There is a huge opportunity with the airport being so close to add flights and encourage more travel. With Des Moines growing I think we are in a prime geographic position to attract great talent to a relatively affordable area of the country.”

- Envision East Central Iowa Stakeholder Survey Respondent



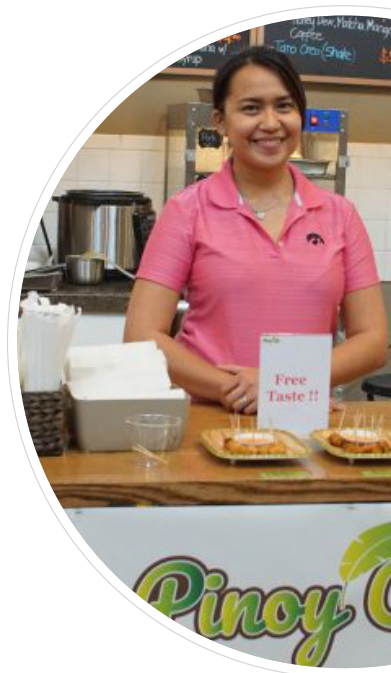
Following the Focus Group sessions, regional stakeholders will be invited to participate in online discussion boards to help foster new thinking and build a regional community dialogue focused on collaboration and alignment.

## 8.0 OUTCOMES AND NEXT STEPS

The outcomes from the Think-Tank will be shared at 13 Focus Group sessions to be held in October and November 2021 (see below). Each county will host at least one in-person Focus Group to capture input specific to that county. An additional 6 industry sector Focus Groups (hybrid format) will also be held to capture the input of those who work or study in the field. These sessions will review the accumulated results from the project thus far and begin to define the priorities, strategies and action steps needed to place East Central Iowa on the trajectory towards its preferred future.

### Schedule of Focus Groups

- October 20, 2021
  - Jones County, Monticello City Council Chambers, 9:00am-11:00am
- October 21, 2021
  - Washington County, Washington Public Library, 9:30am-11:30am
  - Benton & Iowa Counties, Fireside Winery, 2:00pm-4:00pm
- October 22, 2022
  - Food & Bio-Processing, Cedar Rapids Metro Economic Alliance, 8:00am-9:30am
  - Insurance & Finance, Cedar Rapids Metro Economic Alliance, 10:30am-12:00pm
  - Engineering & Automation, Cedar Rapids Metro Economic Alliance, 1:30pm-3:00pm
- October 25
  - Main Street & Small Business, Location TBD, 9:00am-10:30am
  - Education Technology & Services, MERGE Iowa City, 12:00pm-1:30pm
  - Bio-Technology & Medical Technology, BioVentures Center, 2:30pm-4:00pm
- October 26
  - Jones County, Lawrence Community Center, 9:00am-11:00am
- November 15
  - Linn County, Location TBD, 8:00am-10:00am
  - Linn County, Virtual Session, 1:00pm-3:00pm







## 9.0 ACKNOWLEDGMENTS

The ECICOG staff, Strategy Committee Members, and regional stakeholders engaged in this project's activities with great enthusiasm. Their passion and interest ensured the discussions were thoughtful, and the outcomes reflective of the myriad of perspectives that exist within East Central Iowa. This dedication is reflective of the deep commitment participants have to the future of East Central Iowa. Future iQ would like to acknowledge the substantial support from the ECICOG staff, Board, Strategy Committee Members, and regional stakeholders. Their outstanding support, time, and effort were greatly appreciated.

### Strategy Committee Members

- Jasmine Almoayyed, *VP Continuing Education*, Kirkwood Community College
- Mary Audia, *Executive Director*, Washington Economic Development Group
- Kim Becicka, *VP Continuing Education (retired)*, Kirkwood Community College
- Jon Darsee, *Chief Innovation Officer*, University of Iowa
- Eric Engelmann, *Partner*, ISA Ventures
- Les Garner, *President & CEO*, Greater Cedar Rapids Community Foundation
- Nick Glew, *President*, MEDCO
- Katie Knight, *President & CEO*, United Way Johnson and Washington Counties
- Karen Kurt, *Executive Director*, ECICOG
- Derek Lumsden, *Executive Director*, Jones County Economic Development
- Kate Moreland, *President*, ICAD
- Doug Neumann, *Executive Director*, Cedar Rapids Economic Alliance
- Brent Oleson, *Deputy Director of Public Policy and Community Relations*, Linn County
- Jennifer Pratt, *Community Development Director*, City of Cedar Rapids
- Kristin Roberts, *President & CEO*, United Way of East Central Iowa
- Kate Robertson, *Executive Director*, Benton Development Group
- Tracy Seeman, *County Supervisor*, Benton County
- Rod Sullivan, *County Supervisor*, Johnson County
- Janice Weiner, *Councilwoman*, City of Iowa City
- Bob Yoder, *County Supervisor*, Washington County
- Jon Zirkelbach, *County Supervisor*, Jones County







## »»»»»» 10.0 FOR MORE INFORMATION

The East Central Iowa Council of Governments (ECICOG) assists in creating vibrant, forward-thinking communities and in building a collaborative and resilient region. Jointly created by 6 counties in 1974 , ECICOG exists to serve the Benton, Linn, Jones, Iowa, Johnson, and Washington County communities. Learn more at [ecicog.org](http://ecicog.org)!



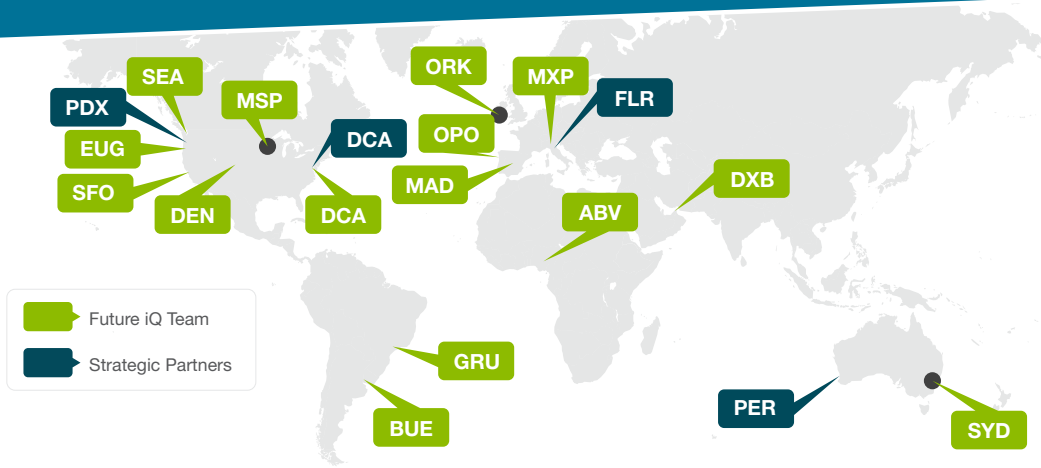
For more information about the Envision East Central Iowa project, please contact:



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## 11.0 CONSULTING TEAM - ABOUT FUTURE IQ

Future iQ specializes in applying innovative tools and approaches to assist municipalities, organizations, regions and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents. To learn more about Future iQ, and our recent projects visit [www.future-iq.com](http://www.future-iq.com) or by email at [info@future-iq.com](mailto:info@future-iq.com).

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**David Beurle**  
CEO, Future iQ

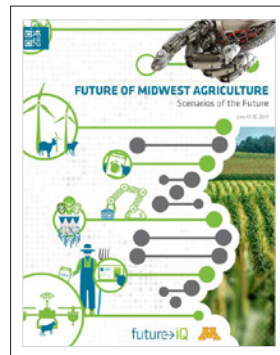


**Heather Branigin**  
VP - Foresight Research

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**Future of Food**  
March 2016



**Future of Midwest Agriculture**  
June 2017



**Next Industrial Revolution**  
March 2018



**Future of Urban Living**  
March 2019



