

GOVA REGION 3 FULL COUNCIL MEETING PACKET

January 21, 2026



Full Council Meeting

Date and Time: January 21, 2026
1:00 p.m. – 3:00 p.m.

Location: All-Virtual

Link: <https://tinyurl.com/y5rdwrwe>

Dial-In: 929-205-6099

Meeting ID: 89871503203

Password: 287955

Purpose Statement

Create more high-paying jobs through incentivized collaboration, primarily through out-of-state revenue, which diversifies and strengthens regional economies.

AGENDA

- I. Call to Order and Chair's Opening Comments Lauren Willis
- II. Roll Call and Confirmation of Quorum..... Ann Wright
- III. Public Comments..... Lauren Willis
- IV. Declaration of Conflicts of Interest..... Lauren Willis
- V. Approval of Meeting Minutes and Notes..... Lauren Willis
- VI. Financial Report and Approved Projects Update..... Andy Wells
- VII. GO Virginia Region 3 Project Funding Matrix Report Ann Wright

Special Appearances and Presentations..... Lauren Willis
VIII. Southern Virginia Living Wage and Job Availability Analysis_Colin Emberland, Chmura Economics & Analytics

Old Business

- IX. Project Pipeline..... Bryan David

New Business..... Bryan David

- X. Southern Virginia Partnership for Health Sciences Careers – Selection of Lead Organization_Dr. Julie Brown, Averett University
- XI. Project Review Committee
 - AM2 Initiative to Grow Advanced Manufacturing in Virginia_Emma Carroll, New River Valley Regional Commission and Sarah Hill-Lyon, Virginia Tech Center for Economic and Community Engagement

Program Director's Report..... Bryan David

- XII. GO Virginia Region Council Staffing Transition
- XIII. SOVA Innovation Hub – OpenAI Foundation People First AI Grant
- XIV. Institute for Advanced Learning and Research 2025 Annual Report

Adjourn

MINUTES

GO VIRGINIA REGION 3 FULL COUNCIL
MEETING MINUTES
Wednesday, October 15, 2025

REGULAR BUSINESS

Call To Order

Chair Willis called the GO Virginia (GOVA) Region 3 Full Council in-person meeting to order on Wednesday, October 15, 2025, at 1:02 p.m. at the SOVA Innovation Hub, 715 Wilbourn Avenue in South Boston, Virginia.

Roll Call and Confirmation of Quorum

Ann Taylor Wright conducted a roll call. Chair Willis declared a quorum was present.

Region 3 Executive Committee Members

| Members | In Person | Virtual | Absent | Members | In Person | Virtual | Absent |
|---------------------|-----------|---------|--------|-------------------|-----------|---------|--------|
| Kelly Lanier-Arnold | | | X | Angie Kellett | X | | |
| Sheldon Barr | | | X | Randolph Lail | X | | |
| Robert Bates | X | | | Elizabeth Leggett | X | | |
| Clark Casteel | X | | | Ilsa Loeser | X | | |
| Melody Foster | X | | | Sheri McGuire | X | | |
| Kristin Gee | X | | | Danny Marshal | X | | |
| Amy Griffin | | X | | John Parkinson | | | X |
| Keith Harkins | X | | | Dale Wagner | | X | |
| Rhonda Hodges | X | | | Lauren Willis | X | | |

Ex Officio Member

| Name – Organization - Role | In Person | Virtual | Absent |
|---|-----------|---------|--------|
| Charley Majors – Region 3 Executive Committee - Advisor | X | | |

Region 3 Staff

| Name – Organization - Role | In Person | Virtual | Absent |
|---|-----------|---------|--------|
| Bryan David (UVA Weldon Cooper Center) - Program Director – Region 3 Contract Staff | X | | |
| Deborah Gosney - Southside PDC - Support Org. & Fiscal Agent | | | X |
| Ann Wright (CTW Consulting) – Southside PDC Contract Staff | X | | |
| Liz Povar (The Riverlink Group) - Southside PDC Contract Staff | | X | |
| Andy Wells – Southside PDC – Support Org. & Fiscal Agent | | | X |

Guests in Attendance

| Name – Organization - Role | In Person | Virtual |
|---|-----------|---------|
| Billy Gammel - DHCD GO Virginia - Senior Program Administrator | X | |
| Jacob Honig – DHCD GO Virginia – Program Administrator | | X |
| Shara Gibson- DHCD GO Virginia – Program Manager | | X |
| Dr. Julie Brown – Averett University - Provost | X | |
| Mark Adelman – City of Danville - Director of Transportation Services | X | |
| Aisha Gwynn – City of Danville – Grant Administrator | X | |
| Sara Beth Morrison – P&HCC – Coordinator of Grant Development | X | |
| Colin Ferguson – P&HCC – Assistant Vice President of Workforce Programs | X | |
| Rebecca Chipman – SIR – BRIC Consultant | | X |
| Rachel Yost – SIR – BRIC Consultant | | X |

Public Comments

No written or verbal public comments were received.

Declaration of Conflicts of Interest

Conflicts of interest potentially exist for activities benefiting and/or contracts issued to the following organizations and projects listed below:

| Name | Organization(s) |
|----------------|---|
| Randolph Lail | Mid-Atlantic Broadband; SOVA Innovation Hub |
| Rhonda Hodges | IALR Foundation Board |
| Clark Casteel | Danville Regional Foundation |
| Lauren Willis | Charlotte County Public Schools |
| Keith Harkins | Southside Virginia Community College |
| Charley Majors | The Institute for Advanced Knowledge & Research; Mid-Atlantic Broadband; SOVA Innovation Hub |
| Sheri McGuire | Longwood University |
| Angie Kellet | Mecklenburg County Economic Development |

Approval of Minutes

Chair Willis noted that the minutes of the July 16, 2025 Full Council meeting were received via email prior to the meeting and included in the meeting packet. **Elizabeth Leggett made a motion that the minutes from the July 16, 2025 Full Council meeting be approved as presented; the motion was seconded by Melody Foster and approved unanimously.**

Financial Reports & Project Update

Bryan David and Ann Wright presented the Financial Reports and Project Updates that were included in the meeting packet for the period ending September 30, 2025. **Randy Lail made a motion that the Financial Reports be approved as presented; the motion was seconded by Clark Casteel and approved unanimously.**

SPECIAL APPEARANCES & PRESENTATIONS

Resolution of Recognition

Chair Willis presented a Resolution recognizing Dr. Julie Brown for her leadership and success with developing, implementing, and managing GO Virginia Region 3 workforce development projects during her tenure at the Institute for Advanced Learning and Research. **Melody Foster made a motion that the Resolution be approved as presented; the motion was seconded by Clark Casteel and approved unanimously.**

OLD BUSINESS

Project Pipeline

Bryan David reviewed the current project pipeline which was emailed to Council members prior to the meeting. The following projects were discussed:

- CEA Innovation Center Research Building Expansion: This will be an implementation project for the CEA Strategy & Roadmap which will involve installing a prefabricated research greenhouse, making associated building improvements, and preparing the site and utilities. A Region 3 request is anticipated in January 2026 for greenhouse research equipment.
- Virginia Tech – Additive Manufacturing and Advanced Materials (AM2) Tech Hub: This initiative is managed by Virginia Tech's Center for Economic and Community Engagement and includes businesses in Regions 2 and 3, Virginia Tech, and the Center for Advanced Learning and Research. The proposed project would build on the Tech Hub and support:
 - Building AM2 Innovation Studios in Blacksburg and Danville
 - Embedding AM2 Innovation Fellows
 - Learning AM2 Career Network to enhance education and training at all levels

This would be a Statewide Competitive project in early 2026.

- Virginia's Heartland Regional Economic Development Alliance: This would be a two-phase Sites Planning Project. Phase I would inventory available sites and building in the region and include a facilitator to support the members in understanding and prioritizing the engineering analysis. Phase II would identify and prioritize larger industrial sites to be developed by the Alliance.
- Farm Park Siting, Fiscal and Economic Impact, and Workforce Development Project: This will be a planning project building upon the recent feasibility report on the Co-location of Data Centers & CEA Greenhouses prepared by Resource Innovation Institute.
- Virginia AI Innovation Hub & Venture Studios: This would be a project supported by Regions 3 and 7. The Smart Innovation Corporation (non-profit) is proposing to develop an industry aligned workforce development program to support individuals pursuing careers in artificial intelligence, data analytics, and applied machine learning, and to support employees of existing businesses in the use of AI in the workplace.
- Region 3 Leadership Development Project: This project will be in partnership with the UVA Sorenson Institute for Leadership and the Virginia Institute for Government to develop a community leadership program in Region 3.

Chair Willis asked members for questions or comments; there being none, there was no discussion regarding the updates.

NEW BUSINESS

Project Review Committee

Danville Aviation Training Facility: The project involves the installation of data network furnishings and equipment for the 13,244 sq. ft. Aviation Training Facility being constructed at Danville Regional Airport. This facility will host Averett University's Aeronautics Program, Danville Community College's Aviation Maintenance Technology Training Program, and the new Danville City Schools' Aviation Science Pathways, which is linked to Danville Community College's program.

Ilsa Loeser made a motion to approve the application as presented; the motion was seconded by Melody Foster and approved unanimously.

Blue Ridge Innovation Corridor (BRIC): This business-led initiative extends from Roanoke to Blacksburg through Martinsville, Danville, and the counties in between. This planning project will retain a qualified consultant to prepare the following deliverables:

- Three sector strategies for Advanced Manufacturing, Life Sciences & Biotechnology, and National Security & Defense Innovation.
- Non-Engineering investment strategy for business sites, broadband, energy, transportation, and workforce housing.
- Funding and financing roadmap strategy to align federal, state, philanthropic, and private capital funding.
- Connectivity strategy for a framework to unify Virginia Tech, Institute for Advanced Learning and Research, Roanoke's life sciences hub, and Danville/Martinsville's advanced manufacturing sectors into a cohesive megaregional platform.

Ilisa Loeser made a motion to approve the application as presented; the motion was seconded by Melody Foster and approved unanimously; Randy Lail and Clark Casteel abstained due to conflict of interest.

Region 3 Industrial Skilled Trades Regional Expansion: Patrick & Henry Community College (P&HCC), Danville Community College (DCC), and Southside Virginia Community College (SVCC) are working collaboratively to grow a strategic talent pipeline to attract new companies and grow existing Region 3 traded-sector businesses through a targeted industry-skilled trades workforce development program. The partner colleges will expand and scale training in carpentry, HVAC, plumbing, powerline workers, and industrial maintenance. This training will result in industry-accepted certifications that are in demand by Region 3's traded-sector businesses. **Clark Casteel made a motion to approve the application as presented; the motion was seconded by Rhonda Hodges and approved unanimously; Keith Harkins abstained due to conflict of interest.**

2025 GO Virginia Region 3 Growth & Diversification Plan

Liz Povar presented the 2025 Growth & Diversification Plan. This final draft reflects input from the Advisory Committee, Region 3 staff, and Department of Housing and Community Development GO Virginia staff. **Keith Harkins made a motion to accept the Plan as presented; the motion was seconded by Elizabeth Leggett and approved unanimously.**

FY25 Region 3 Annual Report

Ann Wright prepared the FY25 Annual Report which was provided in the meeting packet. The report has been submitted to DHCD for approval at their upcoming State Board Meeting. Chair Willis asked members for questions or comments; there being none, there was no discussion regarding the Annual Report.

PROGRAM DIRECTOR'S REPORT

Bryan David presented the Program Director's Report as detailed in the meeting packet which included the GO Virginia State Board Retreat/Meeting and the Southern Virginia Partnership for Health Sciences Careers Implementation Project.

Multiple Letters of Interest were received for the lead organization role for the Southern Virginia Partnership for Health Sciences Careers Implementation Project. A Region 3 selection committee will identify which interested entity is the best candidate to serve as the lead organization per grant eligibility and experience criteria outlined in the Request for Letters of Interest. There will be an opportunity for all interested organizations to actively partner with the project and support the selected lead organization with the implementation project.

ADJOURN

There being no additional business matters to be brought before the GOVA Region 3 Council, Chair Willis adjourned the meeting at 3:00 p.m.

These minutes were approved on ____.

Bryan David, GOVA Region 3
Program Director

Lauren Willis, GOVA Region 3
Council Chair

FINANCIAL REPORT & PROJECT UPDATE

GO VIRGINIA REGION 3 FY25 OPERATING BUDGET

| GO Virginia Remittance Activity FY25 Budget Year: May 1, 2025-April 30, 2026 Report Date: December 2025 | | | |  <small>VIRGINIA INITIATIVE FOR GROWTH & OPPORTUNITY IN EACH REGION</small> | |
|--|-------------------|-----------------|----------------------|---|-------------------|
| FY25 Approved Budget Allocation | | | | | |
| Budget Categories | Operating Budget | Remit # 8 | Previous Remittances | Total to Date Remittances | Balance Remaining |
| PROGRAM OPERATIONS | | | | | |
| Audit | 1,500.00 | - | 1,500.00 | 1,500.00 | - |
| Meetings & Facilitation | | | | | |
| Special Events | - | - | - | - | - |
| Meetings & Trainings | 6,750.00 | - | 840.68 | 840.68 | 5,909.32 |
| Total Meetings & Facilitation | 6,750.00 | - | 840.68 | 840.68 | 5,909.32 |
| Supplies | 150.00 | - | 35.28 | 35.28 | 114.72 |
| Salaries - SPDC | 84,000.00 | 5,706.11 | 64,320.19 | 70,026.30 | 13,973.70 |
| Contract Services | | | | | |
| SPDC UVA MOU | 113,902.00 | - | 65,233.63 | 65,233.63 | 48,668.37 |
| SPDC Contract Staff - Riverlink | 9,000.00 | - | 6,750.00 | 6,750.00 | 2,250.00 |
| Total Contract Services | 122,902.00 | - | 71,983.63 | 71,983.63 | 50,918.37 |
| Outreach/Marketing - Letterpress | 32,880.00 | 3,875.00 | 21,000.00 | 24,875.00 | 8,005.00 |
| Total Program Operations | 248,182.00 | 9,581.11 | 159,679.78 | 169,260.89 | 78,921.11 |
| PLANNING | | | | | |
| G & D plan Update | 1,250.00 | - | - | - | 1,250.00 |
| Technical Assistance | 568.00 | - | - | - | 568.00 |
| Total Planning | 1,818.00 | - | - | - | 1,818.00 |
| TOTAL | 250,000.00 | 9,581.11 | 91,291.75 | 169,260.89 | 80,739.11 |
| The Checking Account is comprised of | | | 49,229.79 | Local Funds (Martinsville-Henry Co EDC Match) | |
| | | | 526.18 | Interest cumulative through November 2025 | |
| | | | 49,249.08 | Total Local Funds | |
| | | | (9,581.11) | Payments | |
| | | | 39,667.97 | Checkbook Register Balance | |
| Payments included in Remittance # 8 | | | | | |
| Letterpress Nov | | 2,625.00 | | | |
| SPDC November Salaries | | 5,706.11 | | | |
| LetterPress Annual Report & Infographica | | 1,250.00 | | | |
| | | - | | | |
| | | - | | | |
| | Total | 9,581.11 | | | |

SEED INNOVATION HUB

Grant Agreement Term: January 2, 2023 - January 1, 2026

Report Period: December 2025

Sub-Grantee: Longwood University Real Estate Foundation

GO VIRGINIA



VIRGINIA INITIATIVE FOR
GROWTH &
OPPORTUNITY
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #6 12/22/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|----------------------|----------------------|--|-----------------------------|---------------------|
| SPDC Project Monitoring/Reporting | \$ 12,000.00 | \$ 7,423.05 | \$ 747.32 | \$ 7,423.05 | \$ 4,576.95 |
| Equipment | \$ 662,304.00 | \$ 578,678.13 | \$ 41,593.32 | \$ 578,678.13 | \$ 83,625.87 |
| Contingencies | \$ - | \$ - | \$ - | \$ - | \$ - |
| Awarded Total | \$ 674,304.00 | \$ 586,101.18 | \$ 42,340.64 | \$ 586,101.18 | \$ 88,202.82 |
| | | | | | |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|------------------------|------------------------|---------------------|------------------------|-----------------------|
| Construction | \$ 2,218,222.00 | \$ 2,282,475.29 | \$ - | \$ 2,282,475.29 | \$ (64,253.29) |
| A&E | \$ 150,000.00 | \$ 115,794.01 | \$ 10,271.19 | \$ 126,065.20 | \$ 23,934.80 |
| Match Total | \$ 2,368,222.00 | \$ 2,398,269.30 | \$ 10,271.19 | \$ 2,408,540.49 | \$ (40,318.49) |

*Overmatched

Status: GOVA funds are 87% expended, the final remittance is forthcoming. The Hub is fully operational except for the heavy duty makerspace, which is awaiting installation of the dust collection system. A community grand opening is planned for early 2026. To date, 121 prototypes have been built in the makerspace, most of them by students. Growth Labs is active, and businesses are being recruited for customized consulting, while Faculty Innovation Fellows continue to offer programming for businesses, including AI-focused sessions. The Sprout Media Lab, part of the co-working space, is operated by faculty and a student team. They are providing marketing and content development support for businesses. Community meetings, trainings, and tours brought 384 individuals to SEED in Q3 of 2025.

MBC MIDDLE MILE CONSTRUCTION

Grant Agreement Term: September 1, 2023 - August 31, 2026

Report Period: December 2025

Sub-Grantee: Mid-Atlantic Broadband

GO VIRGINIA



VIRGINIA INITIATIVE FOR
**GROWTH &
OPPORTUNITY**
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #9 11/24/2025 | Total Paid After Remittance | Grant Balance |
|------------------------------------|------------------------|------------------------|--|-----------------------------|------------------------|
| SPDC Project Administration | \$ 26,713.00 | \$ 10,287.18 | \$ - | \$ 10,287.18 | \$ 16,425.82 |
| MBC Project Administration | \$ 48,083.00 | \$ 384.41 | | \$ 384.41 | \$ 47,698.59 |
| Legal Expenses | \$ 10,684.00 | \$ 171.21 | \$ - | \$ 171.21 | \$ 10,512.79 |
| A&E Fees | \$ 397,144.00 | \$ 311,408.37 | \$ 41,820.62 | \$ 353,228.99 | \$ 43,915.01 |
| Contract Services | \$ 4,517,376.00 | \$ 2,326,747.75 | \$ 917,244.76 | \$ 3,243,992.51 | \$ 1,273,383.49 |
| Awarded Total | \$ 5,000,000.00 | \$ 2,648,998.92 | \$ 959,065.38 | \$ 3,608,064.30 | \$ 1,391,935.70 |
| | | | | | |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|------------------------------------|------------------------|------------------------|----------------------|------------------------|----------------------|
| SPDC Project Administration | \$ 26,713.00 | \$ 27,626.82 | \$ - | \$ 27,626.82 | \$ (913.82) |
| MBC Project Administration | \$ 48,083.00 | \$ 384.40 | | \$ 384.40 | \$ 47,698.60 |
| Legal Expenses | \$ 10,685.00 | \$ 10,561.40 | \$ - | \$ 10,561.40 | \$ 123.60 |
| A&E Fees | \$ 397,144.00 | \$ 508,857.31 | \$ 41,820.62 | \$ 550,677.93 | \$ (153,533.93) |
| Contract Services | \$ 4,517,375.00 | \$ 2,641,185.24 | \$ 917,244.78 | \$ 3,558,430.02 | \$ 958,944.98 |
| Match Total | \$ 5,000,000.00 | \$ 3,188,615.17 | \$ 959,065.40 | \$ 4,147,680.57 | \$ 852,319.43 |
| | | | | | |

Status: GOVA funds are 72% expended. A project extension request is in process. MBC construction continues and is accelerating fiber builds between Stony Creek and Farmville and Louisa. These routes are anticipated to be completed by summer of 2026. Active economic development prospects continue to drive acceleration of the completion timelines. MBC anticipates having all 130+ miles of new middle mile fiber completed by summer of 2027, if not earlier.

GO TEC 2025

Grant Agreement Period: December 13, 2022 - June 30, 2026

Report Period: December 2025

Sub-Grantee: Institute for Advanced Learning & Research

GO VIRGINIA



VIRGINIA INITIATIVE FOR
GROWTH &
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IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories (FROM CAMS) | GOVA Budget | Previously Paid | DHCD Request Drawdown #10 11/4/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|------------------------|------------------------|--|-----------------------------|------------------------|
| SPDC Project Monitoring/Reporting | \$ 17,288.00 | \$ 14,538.45 | \$ 2,615.62 | \$ 17,154.07 | \$ 133.93 |
| Contract Services | \$ 332,243.69 | \$ 117,586.29 | \$ 14,052.90 | \$ 131,639.19 | \$ 200,604.50 |
| Equipment (Freight, Inflationary) | \$ 292,146.96 | \$ 292,146.96 | \$ - | \$ 292,146.96 | \$ - |
| Indirect Costs | \$ 256,114.00 | \$ 150,492.77 | \$ 15,033.36 | \$ 165,526.13 | \$ 90,587.87 |
| Marketing (Outreach) | \$ 94,000.00 | \$ 7,927.84 | \$ 3,238.15 | \$ 11,165.99 | \$ 82,834.01 |
| Salaries & Fringe | \$ 1,961,228.00 | \$ 1,093,249.71 | \$ 134,442.42 | \$ 1,227,692.13 | \$ 733,535.87 |
| Supplies | \$ 151,602.79 | \$ 119,753.11 | \$ 5,387.23 | \$ 125,140.34 | \$ 26,462.45 |
| Training | \$ 336,697.56 | \$ 233,055.59 | \$ 23,756.64 | \$ 256,812.23 | \$ 79,885.33 |
| Travel | \$ 33,500.00 | \$ 17,459.73 | \$ 7,039.86 | \$ 24,499.59 | \$ 9,000.41 |
| Awarded Total | \$ 3,474,821.00 | \$ 2,046,210.45 | \$ 205,566.18 | \$ 2,251,776.63 | \$ 1,223,044.37 |
| | | | | | |

MATCHING FUNDS

| Budget Categories (FROM CAMS) | Committed Match | Previous Match | Current Match | Total Match to Date | Match Balance |
|-----------------------------------|------------------------|------------------------|----------------------|------------------------|------------------------|
| Contract Services | \$ 30,000.00 | \$ 637.20 | \$ - | \$ 637.20 | \$ 29,362.80 |
| Equipment (Freight, Inflationary) | \$ 505,191.00 | \$ 504,959.30 | \$ - | \$ 504,959.30 | \$ 231.70 |
| Marketing (Outreach) | \$ 127,848.00 | \$ 162,325.61 | \$ - | \$ 162,325.61 | \$ (34,477.61) |
| Rent/Lease | \$ 400,500.00 | \$ 251,496.56 | \$ 175,064.20 | \$ 426,560.76 | \$ (26,060.76) |
| Salaries & Fringe | \$ 1,232,540.00 | \$ 1,706,568.69 | \$ 207,409.91 | \$ 1,913,978.60 | \$ (681,438.60) |
| Supplies | \$ 120,000.00 | \$ 87.47 | \$ - | \$ 87.47 | \$ 119,912.53 |
| Travel | \$ 10,000.00 | \$ 9,306.66 | \$ - | \$ 9,306.66 | \$ 693.34 |
| Match Total | \$ 2,426,079.00 | \$ 2,635,381.49 | \$ 382,474.11 | \$ 3,017,855.60 | \$ (591,776.60) |
| | | | | | |

Status: GOVA funds are 65% expended. A project extension has been approved through 6/30/2026. GO TEC is currently in 49 school divisions, in 76 schools, with 79 GO TEC Labs that will reach 11,000+ during the 2025-2026 school year. IALR has contracted with MindSalt to develop a GO TEC Business Plan and meetings are being held weekly with team members. The Governor's proposed budget provides funding for the administrative costs GO TEC to continue its expansion across Virginia middle schools. GO TEC staff is continuing to work with the IRCEs to finalize their individual budgets and prepare a budget revision that will allow the remaining funds to be used most effectively.

VIRGINIA'S GROWTH ALLIANCE (VGA) SITE DEVELOPMENT PROJECT

Grant Agreement Term: September 1, 2023 - August 31, 2025

Report Period: December 2025

Sub-Grantee: Virginia's Growth Alliance

GO VIRGINIA



VIRGINIA INITIATIVE FOR
GROWTH &
OPPORTUNITY
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #5 11/7/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|----------------------|----------------------|---------------------------------------|-----------------------------|---------------------|
| SPDC Project Monitoring/Reporting | \$ 10,825.00 | \$ 9,730.56 | \$ 1,094.44 | \$ 10,825.00 | \$ - |
| A&E | \$ 324,225.00 | \$ 312,870.00 | \$ - | \$ 312,870.00 | \$ 11,355.00 |
| Awarded Total | \$ 335,050.00 | \$ 322,600.56 | \$ 1,094.44 | \$ 323,695.00 | \$ 11,355.00 |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|----------------------|----------------------|---------------|----------------------|--------------------|
| Site Work | \$ 42,500.00 | \$ 42,500.00 | \$ - | \$ 42,500.00 | \$ - |
| A&E | \$ 125,500.00 | \$ 122,170.00 | \$ - | \$ 122,170.00 | \$ 3,330.00 |
| Match Total | \$ 168,000.00 | \$ 164,670.00 | \$ - | \$ 164,670.00 | \$ 3,330.00 |

Status: GOVA funds were 97% expended. Close out has been submitted. Up tiering certification has been completed for the Lunenburg, FASTA, and Heartland sites, and the Heartland well design is also complete. The Brunswick site cannot be up tiered due to a railroad easement issue, and DHCD has been notified.

RISE Build-to-Scale

Grant Agreement Term: January 1, 2024 - December 31, 2026

Report Date: December 2025

Sub-Grantee: SoVa Innovation Hub

GO VIRGINIA



VIRGINIA INITIATIVE FOR
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GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #7 12/3/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------|----------------------|----------------------|---------------------------------------|-----------------------------|----------------------|
| SPDC Project Administration | \$ 40,000.00 | \$ 11,334.28 | \$ 1,761.54 | \$ 13,095.82 | \$ 26,904.18 |
| Fiscal Management: MBC | \$ 20,000.00 | \$ 17,500.00 | \$ 2,500.00 | \$ 20,000.00 | \$ - |
| Marketing: MBC | \$ 30,000.00 | \$ 15,667.86 | \$ 4,136.33 | \$ 19,804.19 | \$ 10,195.81 |
| Contract Services | \$ 510,000.00 | \$ 218,614.87 | \$ 31,238.92 | \$ 249,853.79 | \$ 260,146.21 |
| Awarded Total | \$ 600,000.00 | \$ 263,117.01 | \$ 39,636.79 | \$ 302,753.80 | \$ 297,246.20 |
| | | | | | |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|----------------------|----------------------|--------------------|----------------------|---------------------|
| Marketing: MBC | \$ 50,000.00 | \$ 42,177.59 | \$ 3,250.97 | \$ 45,428.56 | \$ 4,571.44 |
| Administration: MBC | \$ 60,000.00 | \$ 52,298.64 | | \$ 52,298.64 | \$ 7,701.36 |
| Training | \$ 190,000.00 | \$ 165,000.00 | | \$ 165,000.00 | \$ 25,000.00 |
| Match Total | \$ 300,000.00 | \$ 259,476.23 | \$ 3,250.97 | \$ 262,727.20 | \$ 37,272.80 |
| | | | | | |

Status: GOVA funds are 50% expended. To date, RISE has engaged 464 entrepreneurs, served 328 businesses, and facilitated access to \$395,793 in new capital. Businesses served have created 23 jobs, and entrepreneurs have launched 20 new startups. The annual RISE Summit was held on 11/1/2025 with 76 attendees.

GO TEC REGION 3 EXPANSION

Grant Agreement Term: June 4, 2024 - June 3, 2026

Report Date: December 2025

Sub-Grantee: Institute for Advanced Learning & Research

GO VIRGINIA



VIRGINIA INITIATIVE FOR
GROWTH &
OPPORTUNITY
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #3 10/6/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|----------------------|----------------------|---------------------------------------|-----------------------------|--------------------|
| SPDC Project Monitoring/Reporting | \$ 5,690.00 | \$ 1,206.58 | \$ 263.22 | \$ 1,469.80 | \$ 4,220.20 |
| Training | \$ 275,000.00 | \$ 244,755.25 | \$ 25,357.57 | \$ 270,112.82 | \$ 4,887.18 |
| Indirect | \$ 22,000.00 | \$ 19,580.42 | \$ 2,028.61 | \$ 21,609.03 | \$ 390.97 |
| Awarded Total | \$ 302,690.00 | \$ 265,542.25 | \$ 27,649.40 | \$ 293,191.65 | \$ 9,498.35 |
| | | | | | |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|----------------------|----------------------|----------------------|----------------------|------------------------|
| Salaries | \$ 110,000.00 | \$ 54,129.58 | \$ 114,153.59 | \$ 168,283.17 | \$ (58,283.17) |
| Training | \$ 156,000.00 | \$ 208,892.74 | \$ - | \$ 208,892.74 | \$ (52,892.74) |
| Rent/Lease | \$ 37,500.00 | \$ 18,750.00 | \$ 47,880.00 | \$ 66,630.00 | \$ (29,130.00) |
| Match Total | \$ 303,500.00 | \$ 281,772.32 | \$ 162,033.59 | \$ 443,805.91 | \$ (140,305.91) |
| | | | | | |

Status: GOVA funds are 97% expended. GO TEC staff continued teacher training for instructors in preparation for SY25-26. All grant purchases were completed by June 30, 2025, and both labs have been fully set up and stocked. Brunswick County Public Schools is constructing a new school, which will require the James S. Russell Middle School lab to be relocated once the building is finished, but construction delays have caused students to be moved to Brunswick High School with limited access to curriculum equipment. GO TEC has made several attempts to obtain an updated completion timeline from middle school administration, but no information has been provided. To date, 414 students and 2 teachers have been trained.

AMELIA COUNTY DUE DILIGENCE

Grant Agreement Term: October 23, 2024 - October 24, 2025

Report Date: December 2025

Sub-Grantee: Amelia County EDA

GO VIRGINIA



VIRGINIA INITIATIVE FOR
GROWTH &
OPPORTUNITY
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #1 11/5/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|----------------------|-----------------|---------------------------------------|-----------------------------|---------------------|
| SPDC Project Monitoring/Reporting | \$ 3,000.00 | \$ - | \$ 848.66 | \$ 848.66 | \$ 2,151.34 |
| Contract Services | \$ 97,000.00 | \$ - | \$ 82,772.00 | \$ 82,772.00 | \$ 14,228.00 |
| Awarded Total | \$ 100,000.00 | \$ - | \$ 83,620.66 | \$ 83,620.66 | \$ 16,379.34 |
| | | | | | |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|---------------------|----------------|---------------------|---------------------|---------------|
| Acquisition | \$ 50,000.00 | \$ - | \$ 50,000.00 | \$ 50,000.00 | \$ - |
| Match Total | \$ 50,000.00 | \$ - | \$ 50,000.00 | \$ 50,000.00 | \$ - |
| | | | | | |

Status: GOVA funds were 84% expended. All due diligence work has been completed. Close out has been submitted.

ADVANCED MANUFACTURING TPI

Grant Agreement Term: December 10, 2024 - June 9, 2026

Report Date: December 2025

Sub-Grantee: IALR

GO VIRGINIA



VIRGINIA INITIATIVE FOR
GROWTH &
OPPORTUNITY
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #2 8/13/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|----------------------|---------------------|---------------------------------------|-----------------------------|---------------------|
| SPDC Project Monitoring/Reporting | \$ 3,400.00 | \$ - | \$ - | \$ - | \$ 3,400.00 |
| Contract Services | \$ 81,000.00 | \$ 16,500.00 | \$ 16,500.00 | \$ 33,000.00 | \$ 48,000.00 |
| Training | \$ 12,091.00 | \$ - | \$ 2,835.43 | \$ 2,835.43 | \$ 9,255.57 |
| Travel | \$ 10,507.50 | \$ - | \$ - | \$ - | \$ 10,507.50 |
| Indirect Costs | \$ 8,396.00 | \$ - | \$ 1,640.00 | \$ 1,640.00 | \$ 6,756.00 |
| Other | \$ 1,350.00 | \$ - | \$ - | \$ - | \$ 1,350.00 |
| Awarded Total | \$ 116,744.50 | \$ 16,500.00 | \$ 20,975.43 | \$ 37,475.43 | \$ 79,269.07 |
| | | | | | |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|---------------------|--------------------|---------------------|---------------------|---------------------|
| Contract Services | \$ 40,000.00 | \$ 8,250.00 | \$ 9,810.00 | \$ 18,060.00 | \$ 21,940.00 |
| Training | \$ 1,948.00 | \$ - | \$ - | \$ - | \$ 1,948.00 |
| Salaries | \$ 16,494.00 | \$ - | \$ 878.75 | \$ 878.75 | \$ 15,615.25 |
| Other | \$ 1,400.00 | \$ - | \$ - | \$ - | \$ 1,400.00 |
| Match Total | \$ 59,842.00 | \$ 8,250.00 | \$ 10,688.75 | \$ 18,938.75 | \$ 40,903.25 |
| | | | | | |

Status: GOVA funds are 32% expended. 6-month project extension has been approved through 6/9/2025. The Chmura Living Wage and Job Availability Study has been completed and made publicly available. The Talent Pipeline Management Academy cohort completed the training. A "best practice trip" centered on youth Apprenticeship in Manufacturing was hosted in October. The Futures Summit was hosted on Nov. 18. The TPI Plan is in progress. Jessie Vernon is now serving as the project lead.

CO-LOCATION OF DATA CENTERS & CEA GREENHOUSES

Grant Agreement Term: December 17, 2024 - March 31, 2026

Report Date: December 2025

Sub-Grantee: IALR

GO VIRGINIA



VIRGINIA INITIATIVE FOR
GROWTH &
OPPORTUNITY
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #2 10/20/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|---------------------|---------------------|--|-----------------------------|--------------------|
| SPDC Project Monitoring/Reporting | \$ 2,000.00 | \$ 367.22 | \$ 262.30 | \$ 629.52 | \$ 1,370.48 |
| Contract Services | \$ 50,000.00 | \$ 23,880.77 | \$ 26,035.82 | \$ 49,916.59 | \$ 83.41 |
| Awarded Total | \$ 52,000.00 | \$ 24,247.99 | \$ 26,298.12 | \$ 50,546.11 | \$ 1,453.89 |
| | | | | | |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|---------------------|---------------------|---------------|---------------------|--------------------|
| Contract Services | \$ 23,500.00 | \$ 27,014.75 | \$ - | \$ 27,014.75 | \$ (3,514.75) |
| Salaries | \$ 2,520.00 | \$ - | \$ - | \$ - | \$ 2,520.00 |
| Match Total | \$ 26,020.00 | \$ 27,014.75 | \$ - | \$ 27,014.75 | \$ (994.75) |
| | | | | | |

Status: GOVA funds are 97% expended. The Feasibility Report has been completed and approved by IALR. It has been published on the IALR website and shared with the Secretary of Agriculture and Forestry's office, VDACS, and VEDP. An implementation project is planned as the next step. An extension was granted to accommodate work group meetings necessary to meet the required local match.

AI STATEWIDE LANDSCAPE ASSESSMENT

Grant Agreement Term: February 28, 2025 - February 27, 2026

Report Date: December 2025

Sub-Grantee: Virginia Chamber



VIRGINIA INITIATIVE FOR
GROWTH & OPPORTUNITY
IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #1 12/8/2025 | Total Paid After Remittance | Grant Balance |
|-----------------------------------|----------------------|-----------------|---------------------------------------|-----------------------------|---------------------|
| SPDC Project Monitoring/Reporting | \$ 1,000.00 | \$ - | \$ 635.04 | \$ 635.04 | \$ 364.96 |
| Contract Services | \$ 99,000.00 | \$ - | \$ 67,125.00 | \$ 67,125.00 | \$ 31,875.00 |
| Awarded Total | \$ 100,000.00 | \$ - | \$ 67,760.04 | \$ 67,760.04 | \$ 32,239.96 |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|---------------------|----------------|---------------------|---------------------|---------------------|
| Salaries | \$ 45,000.00 | \$ - | \$ 36,237.09 | \$ 36,237.09 | \$ 8,762.91 |
| Outreach | \$ 5,000.00 | \$ - | \$ - | \$ - | \$ 5,000.00 |
| Match Total | \$ 50,000.00 | \$ - | \$ 36,237.09 | \$ 36,237.09 | \$ 13,762.91 |

Status: GOVA funds are 32% expended. The project consultant (Economic Leadership) has now participated in 8 Blueprint Tour events since April, with 520 attendees completing AI-in-the-workplace surveys. A total of 38 stakeholder interviews have been conducted, and an online survey gathered additional employer perspectives on AI. AI workforce demand and training offerings report is complete. Press release on 1/6/2026.

SVCC Occupational Training Facility

Grant Agreement Term: October 1, 2025 - September 30, 2027

Report Date: December 2025

Sub-Grantee: SOVA Innovation Hub



VIRGINIA INITIATIVE FOR
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IN EACH REGION

GO VIRGINIA GRANT FUNDS

| Budget Categories from CAMS | GOVA Budget | Previously Paid | DHCD Request Drawdown #1 11/6/2025 | Total Paid After Remittance | Grant Balance |
|--------------------------------|----------------------|-----------------|---------------------------------------|-----------------------------|----------------------|
| Project Monitoring & Reporting | \$ 4,000.00 | \$ - | \$ - | \$ - | \$ 4,000.00 |
| Equipment | \$ 492,106.00 | \$ - | \$ 91,134.00 | \$ 91,134.00 | \$ 400,972.00 |
| Contingencies | \$ 73,894.00 | \$ - | \$ - | \$ - | \$ 73,894.00 |
| Awarded Total | \$ 570,000.00 | \$ - | \$ 91,134.00 | \$ 91,134.00 | \$ 478,866.00 |

REQUIRED MATCHING FUNDS

| Budget Categories from CAMS | Committed Match | Previous Match | Current Match | Total Match To Date | Match Balance |
|-----------------------------|----------------------|----------------|----------------------|----------------------|----------------------|
| A&E | \$ 133,200.00 | \$ - | \$ - | \$ - | \$ 133,200.00 |
| Land Acquisition | \$ 151,800.00 | \$ - | \$ 151,800.00 | \$ 151,800.00 | \$ - |
| Match Total | \$ 285,000.00 | \$ - | \$ 151,800.00 | \$ 151,800.00 | \$ 133,200.00 |

Status: GOVA funds are 16% expended. Two trailers have been delivered and are now in use, with plans to add the Region 3 GOVA logo. Driving track construction is complete. The building project has been bid, with Kenbridge Construction tentatively awarded and scheduled to start in late January and finish in August. Two tractors are in production and expected to be delivered by the end of January.

PROJECT FUNDING MATRIX

| Project Name | G & D Plan Investment Strategy | Project Status | Award Date | Fiscal Close Out Report Date | Grant Amount Awarded | Per Capita Grant Amount Expended | Project Match | State Competitive Amount Expended | State Competitive Match | Funding Pool |
|--|--------------------------------|-----------------|-------------------|------------------------------|----------------------|----------------------------------|---------------------|-----------------------------------|-------------------------|--------------------------|
| TOTAL ALLOCATIONS THROUGH: FY26 | | | | | | 8,301,293.09 | | | | |
| GO TEC Phase 1 | Talent Evolution | Closed | 02/13/18 | 3/12/2021 | 648,000 | 617,172.79 | 1,966,230.33 | | | Per Capita |
| SOVA Innovation Hub | Startup Ecosystem | Closed | 07/25/18 | 6/30/2020 | 80,000 | 79,919.80 | 79,919.81 | | | Per Capita-Planning |
| GO TEC Phase 2A | Talent Evolution | Closed | 03/12/19 | 6/30/2021 | 1,320,787 | | | 1,320,787.00 | \$2,157,605.00 | State Competitive |
| E&I Strategic Initiative | Startup Ecosystem | Closed | 10/09/19 | 1/13/2021 | 100,000 | 77,662.12 | 90,641.32 | | | Per Capita |
| Operation Last Mile Drone | Cluster Scale Up | Closed | 04/15/20 | 10/15/2020 | 75,000 | | | 75,000.00 | \$84,198.00 | COVID ERR Fund |
| IALR Common Platform | Talent Evolution | Closed | 04/15/20 | 12/15/2021 | 90,140 | 88,914.96 | 119,369.53 | | | Per Capita-Planning |
| GO TEC Phase 2B | Talent Evolution | Closed | 06/23/20 | 9/30/2022 | 3,575,741 | | | 3,360,247.21 | \$2,672,970.00 | State Competitive |
| MBC Middle Mile Planning | Site Development | Closed | 08/04/20 | 12/31/2022 | 100,000 | 99,017.68 | 891,159.12 | | | Per Capita-Planning |
| Bridge to Recovery | Cluster Scale Up | Closed | 06/23/20 | 9/27/2023 | 925,000 | | | 767,818.64 | \$722,303.00 | COVID ERR Fund |
| E&I Implementation | Startup Ecosystem | Closed | 03/16/21 | 9/29/2023 | 449,000 | 448,120.25 | 418,229.59 | | | Per Capita |
| SVRA Site Development | Talent Evolution | Closed | 09/23/21 | 12/31/2025 | 1,534,900 | 1,494,464.19 | 767,450.00 | | | Per Capita |
| ExperienceWorks | Talent Evolution | Closed | 09/23/21 | 3/31/2024 | 515,628 | 321,436.64 | 257,814.00 | | | Per Capita |
| Controlled Environment Ag (CEA) Planning | Cluster Scale Up | Closed | 11/29/21 | 6/30/2023 | 77,803 | 77,315.50 | 40,230.90 | | | Per Capita-Planning |
| SEED Innovation Hub | Startup Ecosystem | Active | 12/15/21 | | 674,304 | 674,304.00 | 2,368,222.00 | | | Per Capita |
| VGA Refresh Planning | Site Development | Closed | 01/19/22 | 12/31/2023 | 100,000 | 100,000.00 | 51,000.00 | | | Per Capita-Planning |
| MBC Middle Mile Construction | Site Development | Active | 03/10/22 | | 5,000,000 | | | 5,000,000.00 | \$5,000,000.00 | State Competitive |
| Gupton Initiative (\$64,200 from Regions 1,2,4,8) | Talent Evolution | Closed | 06/23/22 | 12/31/2023 | 99,200 | 99,177.65 | 55,000.00 | | | Per Capita-Planning |
| CRC REDO Planning | Site Development | Closed | 08/18/22 | 1/31/2024 | 65,000 | 64,279.45 | 44,500.00 | | | Per Capita-Planning |
| GO TEC Virginia 2025 | Talent Evolution | Active | 12/13/22 | | 3,474,821 | | | 3,474,821.00 | \$2,426,079.00 | State Competitive |
| PHCC GO TEC Welding Instructor | Talent Evolution | Closed | 03/14/23 | | 118,545 | 118,545.00 | 129,261.00 | | | Per Capita |
| SVCC GO TEC Mechatronics Instructor | Talent Evolution | Closed | 03/14/23 | | 139,732 | 139,732.00 | 223,208.00 | | | Per Capita |
| VGA Site Development | Site Development | Active | 06/13/23 | | 335,050 | 335,050.00 | 168,000.00 | | | Per Capita |
| SOVA RISE Build to Scale | Startup Ecosystem | Active | 09/12/23 | | 600,000 | 600,000.00 | 300,000.00 | | | Per Capita |
| SoVA Health Sciences Careers Planning | Talent Evolution | Closed | 09/12/23 | | 133,000 | | | 108,251.12 | \$67,500.00 | Talent Pathways |
| Amelia Co Reg. Commerce Center: Due Diligence | Site Development | Active | 10/08/24 | | 100,000 | 83,620.66 | 50,000.00 | | | Per Capita-Planning |
| Amelia Co Reg. Commerce Center: Site Study | Site Development | Closed | 05/06/24 | 10/16/2024 | 21,000 | 20,996.74 | 10,500.00 | | | Per Capita-Planning |
| GO TEC Region 3 Expansion | Talent Evolution | Active | 06/04/24 | | 302,690 | 302,690.00 | 303,500.00 | | | Per Capita |
| Advanced Manufacturing/CEA Initiative | Talent Evolution | Active | 12/10/24 | | 116,745 | | | 116,745.00 | \$59,842.00 | Talent Pathways |
| Co-Location of Data Centers & CEA | Site Development | Active | 12/10/24 | | 52,000 | 52,000.00 | 26,020.00 | | | Per Capita-Planning |
| Chamber-AI Project (\$50,000 from Region 2) | Talent Evolution | Active | 3/5/2025 | | 100,000 | 100,000.00 | 50,000.00 | | | Per Capita-Planning |
| SOVA Fab Lab | Startup Ecosystem | Approved | 6/10/2025 | | 510,000 | 510,000.00 | 260,000.00 | | | Per Capita |
| SVCC Occupational Training Facility | Talent Evolution | Active | 6/10/2025 | | 570,000 | 570,000.00 | 285,000.00 | | | Per Capita |
| VA's Gateway Region Site Dev (w/Region 4) | Site Development | Active | 10/7/2025 | | 11,111 | 11,111.00 | | | | Per Capita |
| Danville Aviation Training Facility | Talent Evolution | Approved | 12/10/2025 | | 92,000 | 92,000.00 | 46,000.00 | | | Per Capita |
| Blue Ridge Innovation Corridor (w/Region 2) | Cluster Scale Up | Approved | 12/10/2025 | | 250,000 | | | 250,000.00 | \$125,000.00 | State Competitive |
| Industrial Skills Trades Regional Expansion | Talent Evolution | Approved | 12/10/2025 | | 1,346,786 | 857,383.32 | 673,393.00 | 489,402.68 | | State Competitive |
| TOTAL PROJECT FUNDING | | | | | | 23,703,983 | 8,034,913.75 | 9,674,648.60 | 14,963,072.65 | \$13,315,497.00 |
| PER CAPITA PROJECT AVAILABLE BALANCE | | | | | | | 266,379.34 | | | |

Of the \$1,000,000 that is awarded annually, no more than \$250,000 can be utilized for Planning Projects.

Projects highlighted in green are not funded by the Region 3 Per Capita allocation.

Date of Award for Planning Grants is the date DHCD staff approved it.

DHCD recaptured \$497,944.75 per letter dated October 4, 2024.

SPECIAL APPEARANCES & PRESENTATIONS



DATE: January 15, 2026

TO: Region 3 Council

FROM: R. Bryan David, Program Director

A handwritten signature in blue ink that appears to read 'R. Bryan David'.

RE: Southern Virginia Living Wage and Job Availability Analysis (11.2025)

As the Region 3 Council may recall, the GO Virginia State Board established the Talent Pathways Initiative (TPI) in 2022 to "...foster collaboration between business and education to meet workforce needs by developing, retaining, and attracting talent to the Commonwealth to meet the needs of Virginia businesses." Each region has access to up to \$250,000 to conduct a situational analysis and develop a regional talent pathway strategy to support the workforce needs of priority industry clusters identified in their approved 2021 Growth and Diversification plan.

In October 2023, the Region 3 Council approved \$133k from the TPI fund for the Southern Virginia Partnership for Health Science Careers.

In October 2024, the Region 3 Council approved the remaining funds (\$116,745) to Dr. Julie Brown at the Institute for Advanced Learning and Research "...to align the GO TEC® efforts with the EmPOWER Employer Engagement framework, engaging industry representatives and strengthening the region's capacity to support advanced manufacturing job growth and existing workforce needs."

An element of this project involved engaging Chmura Economics and Analytics to update its **2016 SOVA Living Wage Study**, which focused on six (6) Region 3 localities. The update would include all the Region 3 localities in this report. Other elements of the grant included education and workforce training, employer job analytics, and partnering with the US Chamber of Commerce Foundation to offer the Talent Pipeline Academy to key Region 3 business-sector stakeholders.

The **Southern Virginia Living Wage and Job Availability Analysis (11.2025)** was presented at the IALR's Futures Summit: Shaping Tomorrow's Workforce & Economy in November at the Prizery in South Boston. The event included TPI academy participants and representatives from Region 3's workforce and education organizations.

I have invited Colin Emberland to present this report at the Region 3 Council's meeting on January 21st. He is an Economic Consultant with Chmura and was a principal author of the report.

Attached are copies of the report and an editorial by [Dwayne Yancey with Cardinal News from January 5th](#) profiling the report's findings.

RECOMMENDATION:

For the Region 3 Council's information. No action is needed.

OPINION

Report shows Southside Virginia has more than 3,400 health care jobs that are unfilled

The report shows there's a mismatch between the workers available and the jobs available. Southside has manufacturing workers with no jobs but health care jobs with no workers available to fill them.

 by **Dwayne Yancey**
January 5, 2026

A certified registered nurse anesthetist at work. Courtesy of Martin Waymire.



Report shows Southside Virginia has more than 3,400 health care jobs that are unfilled

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Much of Southside Virginia has more jobs available than workers available, but those jobs and workers are often misaligned in terms of qualifications, creating surpluses of workers in some sectors, particularly manufacturing, and huge numbers of vacancies in health care.

Those are some of the key findings in a report recently conducted for GO Virginia Region 3, the economic development region that stretches from Patrick County east to Brunswick County and north to Buckingham and Cumberland counties to form a triangle in the southern part of Virginia. The region includes Danville and Martinsville but not Lynchburg. There are other parts of Southside that aren't in this region, and there may be some localities in the west that consider themselves more part of Southwest than Southside. For simplicity's sake, I'll use "Southside" as the shorthand for this particular region because the general public understands that term better than it does "GO Virginia Region 3."



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The map of GO Virginia regions. Courtesy of GO Virginia.

The report, conducted by Chmura Economics & Analytics of Richmond, found the region gaining high-wage jobs but with an economy still weighted toward lower-wage ones. The report documents a huge and growing need for health care-related jobs, particularly nurses. Finally, the report finds that the average living wage for many adults in Southside is lower than the proposed minimum wage that the Democrats in the General Assembly would like to enact, which raises both economic and political questions.

While these findings pertain to just one part of Virginia, the report contains insights that may well apply to other parts of the state, particularly rural ones. Here's a summary:

Southside Virginia has a mismatch between workers available and jobs available

This shouldn't surprise us. We've seen similar data out of Northern Virginia that shows the federal workers who have lost their jobs don't always match up well with the private sector jobs that are available. While the federal government is a unique employer, the overall situation of workers and jobs that aren't aligned isn't.

This report says that in early 2025, there were 14,483 available workers across Region 3 — defined as those who are unemployed or just entering the workforce. Meanwhile, there were 15,383 jobs unfilled. In theory, that means each of those workers could find a job, with 900 jobs left to fill, but the reality is more complicated because of those mismatches. The sector with the most jobs available has the hardest time finding workers because there aren't enough people skilled in that profession: health care.

Table 6.1: Workforce Availability and Job Openings, Q1 2025

| Occupation Groups | Available Workforce June 2025 | Job Openings Q1, 2025 | Labor Surplus |
|--|----------------------------------|--------------------------|---------------|
| Architecture and engineering | 98 | 179 | -81 |
| Arts, design, entertainment, sports, and media | 163 | 352 | -189 |
| Building and grounds cleaning and maintenance | 619 | 477 | 142 |
| Business and financial operations | 540 | 370 | 170 |
| Community and social service | 299 | 690 | -391 |
| Computer and mathematical | 144 | 161 | -17 |
| Construction and extraction | 543 | 352 | 191 |
| Education, training, and library | 833 | 563 | 270 |
| Farming, fishing, and forestry | 177 | 20 | 157 |
| Food preparation and serving related | 1801 | 1,076 | 725 |
| Healthcare practitioners and technical | 434 | 3,854 | -3,420 |
| Healthcare support | 1222 | 820 | 402 |
| Installation, maintenance, and repair | 494 | 727 | -233 |
| Legal | 36 | 18 | 18 |
| Life, physical, and social science | 78 | 174 | -96 |
| Management | 786 | 1,081 | -295 |
| Office and administrative support | 1281 | 958 | 323 |
| Personal care and service | 498 | 178 | 320 |
| Production | 1186 | 359 | 827 |
| Protective service | 392 | 196 | 196 |
| Sales and related | 1346 | 1,631 | -285 |
| Transportation and material moving | 1513 | 1,147 | 366 |
| Total | 14,483 | 15,383 | -900 |

Note: A negative number implies there is a labor shortage in those occupations

Source: Chmura Economics & Analytics

The Southern Virginia Living Wage and Job Availability Analysis report contains this list of job openings and available workforce in each category.

Southside needs more than 3,400 health care workers

Health care has the biggest mismatch, with a relatively small number of available workers for a large and growing number of jobs available. The report finds that Region 3 has 434 health care workers seeking employment — but the region has 3,854 health care jobs available. That leaves a deficit of 3,420 workers. The deficit might actually be higher because there may be further mismatches within the health care sector — a physical therapist wouldn't fit into a nursing position, for instance, or vice versa.

This deficit is not unusual across Virginia, although it is more pronounced in Southside. Gov. Glenn Youngkin recently posted a chart about 255,000 jobs available in Virginia. Of those, 32,246 were in health care. Statewide, health care jobs account for 13% of the state's job vacancies. In Southside, they account for 25% of the job vacancies.

We'll come back to some of the other mismatches between workers available and jobs available, but while we're on the subject of health care workers, there's more data to look at.

The health care job openings in Southside have nearly tripled over the past eight years

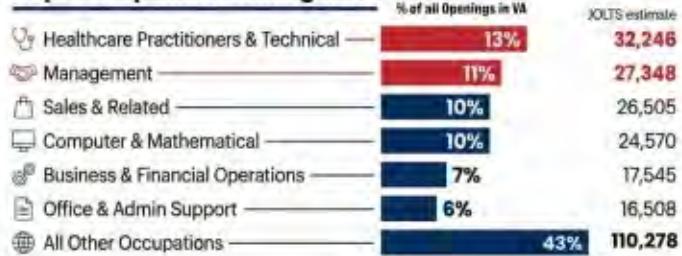
From June 2017 to June 2025, the number of health care openings in the region has grown by 2.6 times.

Southside is not alone. Health care jobs are a growth sector nationally, driven by demography. We're an aging society, and the older we get, the more health care needs we have. Rural areas tend to be older than metro areas, so we shouldn't be surprised to see the demand for health care positions increase so much.

255,000 JOBS OPEN IN VIRGINIA

Health care, management, technical, sales, and manufacturing roles are in demand

Top Occupations Hiring Now



Top Industries Hiring Now



1.6 jobs open for every Virginian looking for work — far above the national average.



Find your next job at VirginiaHasJobs.com



Source: Governor Glenn Youngkin.

Still, this demand for health care workers dwarfs all others in Region 3. The number of health care openings is more than twice the next biggest set of job listings — the retail trade.

Furthermore, the available retail positions have shrunk by 27.2% over the past eight years. But health care openings are growing, and at a faster rate than almost anything else. That brings us to this:

The nature of Southside's job needs is changing

Eight years ago, the single biggest category of job openings in Southside was in retail — 29.5% of the open jobs. Health care was further back, at 18.0%. The third biggest sector in search of jobs then was in accommodation and food service — hotels and restaurants — which accounted for 12.5% of the openings. No other job sector was in double digits.

Fast forward to this year. The overall number of job openings has increased, and 83.5% of those have come in health care. That's where the job growth is (or would be if those positions could be filled).

This year, 35.3% of the open jobs in Southside are in health care, about double the share eight years ago. Retail has shrunk by about half, to 15.8%. Hotels and restaurants have slipped to 10.9%.

Almost half those health care openings are for registered nurses

Of those open health care positions, nearly half are for registered nurses — 48.2%. The second-biggest need in the health care sector is for physical therapists (13.2%), followed by speech-language pathologists (12.2%).

The demand for registered nurses also explains part of the reason why wages in Southside are rising, but we're getting ahead of ourselves.

Health care is driving the economic growth, not manufacturing

Manufacturing occupies an outsized amount of economic attention. Politicians from both parties love to talk about how they're going to revive manufacturing. That's a particularly attractive message in Southside, a part of the state once dotted with mill towns.

However, this report paints a more complicated picture of manufacturing's role in the Southside economy, particularly in terms of its standing vis-a-vis health care.

The region now has more health care jobs (20,949) than manufacturing jobs (17,231), with retail jobs third (14,084).

Overall, manufacturing jobs pay an average higher wage than health care jobs (\$61,245 vs. \$48,892). However, of the manufacturing jobs that are actually open, health care jobs pay better — and there are far more of them.

Of the open positions in Southside, only 5.1% are in manufacturing. Of the sectors with vacancies, it only ranks sixth. By contrast, 27.6% of the job vacancies in Southside are in health care, with sales jobs coming in a distant second at 8.8%.

Of the manufacturing jobs available in June 2025, the single biggest group — 26.9% — paid in the \$15 to \$17.99 per hour range. The second biggest group, 21.6%, paid in the \$18 to \$19.99 range. That's nearly half between \$15 and \$19.99 per hour.

Of the health care jobs available, the single biggest group — 39.2% — paid in the \$30 to \$39.99 range. The next biggest group — 24.3% — were in the next-highest pay range, \$40 per hour and up. Together, that's 63.5% paying \$30 per hour or more. Only 16.9% of the much smaller number of manufacturing jobs paid in that range.

Furthermore, the report forecasts that health care will lead job growth in Southside over the next five years, with manufacturing falling to fourth.

The report sees a demand for 10,921 health care workers in the coming years — 17.3% of the new jobs in Southside. Hotels and restaurants will need 8,727 — 13.8% of the new jobs. Retail comes third, with a need for 8,739 jobs — another 13.8% of the total. Manufacturing comes fourth, at 7,940 jobs — 12.6%.

The economic challenge is that those hotel/restaurant and retail jobs don't pay nearly as much — \$23,362 in the former, \$31,465 in the latter. If you add in recreation jobs (\$27,833), then 29.2% of the region's job growth is forecasted to be in the three lowest-paid job sectors.

Southside has a lot of unemployed manufacturing workers

While health care has more jobs than workers, manufacturing is just the opposite: It has more workers than jobs.

The report said Southside has 1,186 available production workers — that's clinical language for unemployed. They are chasing 359 jobs, leaving a "labor surplus" of 827 people. Of 22 job categories listed, no other category had that many people "available." The size of that available pool of manufacturing workers was twice as big as anything else.

This is a statistical picture of the economic dislocation across Southside following the demise of traditional industries such as textiles and furniture.

There are two ways to look at this situation. One way is to say there are a lot of people who may be waiting for a manufacturing renaissance that may never come, at least not on the scale they need. The second way is to say that this is an available workforce that represents a sales opportunity: Any manufacturing company that's looking at the region won't have to worry about finding a workforce; it's already there and waiting.

The percentage of job openings in higher-paid jobs is increasing

The whole point of the GO Virginia initiative has been to create higher-wage jobs in each part of the state — a worthy goal. This report says that it seems to be succeeding in Southside.

"In June 2017, job postings were more concentrated in lower-wage sectors than in June 2025," the report says. That's because of those stats I cited above. In 2017, the single-biggest demand was in retail jobs; now it's in health care, and health care pays better. "This suggests that the GO Virginia 3 region has made progress on transitioning from lower-wage, lower-skilled jobs to higher-wage, higher-skilled jobs," the report says.

The question is how much of that has happened naturally — we need more health care workers because we're getting older, not because somebody lured some big health care factory — and how much is the result of government initiatives.

I'd contend that all of these stats have statewide implications, but this one really does:

The average living wage in Southside is lower than the proposed state minimum wage

The cost of living in Southside is low. In every category that goes into calculating a "living wage" — child care, food, health care, housing, taxes, transportation — Southside comes in lower than both the state and national averages, the report says.

Accordingly, its living wage is lower, too.

A living wage is defined as the ability to meet "basic living expenses."

The report calculates that the average living wage in Southside is \$14.56 per hour. Virginia's minimum wage rose to \$12.77 on Jan. 1, but Democrats in the General Assembly would like to raise it to \$15 per hour by 2028, with increases after that tied to the cost of living.

The main argument for raising the minimum wage to \$15 is that, in many places, the current rate of \$12.77 is not a living wage. The Massachusetts Institute of Technology living wage calculator estimates that in Arlington, the living wage for a single adult requires \$19.46 per hour for two working adults with no children or \$30.54 for one adult living alone with no children.

A minimum wage increase to \$15 per hour, which would put some of the more expensive parts of the state closer to a living wage, would put some Southside workers even higher above it. By that measure, a minimum wage increase would be an economic boon to some Southside workers. On the other hand, the question is how many employers could afford that, and what kind of inflationary spiral that might set in motion.

For those curious about this, I refer you to this chart in the report. The "average living wage" is something of a misnomer because there are multiple "average living wage" depending on family size and composition. This report calculated the figure for 12 different types of families. Depending on the family, the "average living wage" in Southside actually varies from \$9.42 per hour for two adults with no children to \$32.10 for one adult with three children.

Table 3.9: Estimated Annual Living Wage-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|----------------|
| 1 Adult | \$13.60 | \$14.93 | \$11.82 |
| 1 Adult 1 Child | \$21.03 | \$23.20 | \$18.72 |
| 1 Adult 2 Children | \$27.51 | \$30.03 | \$24.84 |
| 1 Adult 3 Children | \$35.64 | \$38.98 | \$32.10 |
| 2 Adults (1 working) | \$19.71 | \$21.21 | \$17.58 |
| 2 Adults (1 working) 1 Child | \$22.55 | \$24.34 | \$20.17 |
| 2 Adults (1 working) 2 Children | \$25.75 | \$27.61 | \$23.16 |
| 2 Adults (1 working) 3 Children | \$30.92 | \$33.29 | \$27.65 |
| 2 Adults | \$10.56 | \$11.29 | \$9.42 |
| 2 Adults 1 Child | \$13.92 | \$15.01 | \$12.53 |
| 2 Adults 2 Children | \$16.93 | \$18.22 | \$15.36 |
| 2 Adults 3 Children | \$20.85 | \$22.53 | \$18.86 |

Source: Chmura Economics and Analytics

The Southern Virginia Living Wage and Job Availability Analysis has this chart on the average living wage in Southside.

And then there's this: About 90% of the job openings in Southside are already at \$15 per hour or more; it's those 10% who would get a raise from an increase in the minimum wage (assuming their job didn't get automated or eliminated after that). Whether that increase truly lifts them into a living wage, or puts them higher than one, would depend on their family type.

You can also see in this the upward lift of wages over the past eight years, which helps support the point above that the region's jobs are coming more in higher-wage positions (thanks largely to health care).

Table 5.6: Job Openings by Pay Range in GO Virginia Region 3

| Wage Range | June 2025 | | June 2017 | |
|-------------------|-----------|-------|-----------|-------|
| | Volume | (%) | Volume | (%) |
| \$7.25 - \$8.99 | na | na | 705 | 12.2% |
| \$9.00 - \$10.99 | na | na | 1,373 | 23.8% |
| \$11.00 - \$12.99 | 206 | 2.7% | 859 | 14.9% |
| \$13.00 - \$14.99 | 564 | 7.3% | 305 | 5.3% |
| \$15.00 - \$17.99 | 1,810 | 23.5% | 898 | 15.5% |
| \$18.00 - \$19.99 | 762 | 9.9% | 147 | 2.5% |
| \$20.00 - \$24.99 | 907 | 11.8% | 422 | 7.3% |
| \$25.00 - \$29.99 | 856 | 11.1% | 365 | 6.3% |
| \$30.00 - \$39.99 | 1,456 | 18.9% | 321 | 5.6% |
| \$40.00 and up | 1,125 | 14.6% | 384 | 6.6% |

Source: Chmura & JobsEQ

The Southern Virginia Living Wage and Job Availability Analysis has this chart that shows what job openings in the region pay and how those have changed.

What about other regions?

The GO Virginia program is supposed to allow different regions to tailor their own initiatives. What Southside needs may not be what the Shenandoah Valley needs, and so forth. That said, I'd sure be curious to see numbers like this for all the other parts of the state.

If someone somewhere wants to take that as a hint, please do.

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PREPARED FOR

The Institute for Advanced Learning and Research



11/4/2025

Southern Virginia Living Wage and Job Availability Analysis

1. Executive Summary

The Institute for Advanced Learning & Research (IALR) serves as a regional catalyst for economic transformation. IALR's vision is to realize Southern Virginia as home to a dynamic economy where all can live and thrive. To accomplish this vision, IALR desires to understand the region's living wage (i.e., the employment income needed to meet basic household expenses) and the availability of jobs which pay a living wage. Chmura Economics & Analytics (Chmura) was contracted to perform such an analysis.

Chmura used the methodology first developed by Chmura for the Dan River Region in 2016 at the request of the Dan River Region Collaborative (DRRC) in order to compute the living wage. During the 2016 study, a survey was conducted to understand the composition of the region's families, which Chmura extrapolated to include the **entire GO Virginia 3 region in 2024**. Chmura then estimated the quantity and quality of job openings in the region before evaluating whether the localities in the region have the capacity to provide jobs which pay a living wage. Finally, Chmura forecasted demand alignment. The main conclusions of the research are summarized below:

Using the methodology from the previous 2016 DRRC study, Chmura estimated the living wage for the region.

- Chmura's estimated annual living expenses for the region ranged from \$24,582 for a one-adult family to \$78,445 for a family with two adults (both working) and three children. Within the region, living expenses were lowest in the cities of Danville and Martinsville and highest in Amelia County. **Compared with the MIT calculator, Chmura's estimated family living expenses were lower for all family types.**
- Chmura converted annual minimum living expenses into a pre-tax hourly wage rate for each family type and locality.
 - The living wage is lowest at \$9.42 per hour for a family with two working adults without children.
 - Two family types, families with two working adults without children and families with one adult without children can be supported on a state minimum wage of \$12.41.
 - The highest living wage is for families with one adult and three children, which is estimated to be \$32.10 per hour.
 - Chmura estimated the average living wage for the region is \$14.56 per hour, \$2.15 higher than the state minimum wage.**

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- IALR also sought to understand the difference in living wages between full-time and part-time workers. The key difference in living expenses between these groups is healthcare cost, which is lower for part-time workers due to healthcare subsidies. The living wage is lowest for part-time workers for a family with two working adults without children, at \$8.71 per hour. The highest living wage for part-time workers is for a family with one adult and three children which is estimated to be \$29.95 per hour.

Using Chmura's Real-Time Intelligence (RTI) database, the quantity and quality of available jobs in the GO Virginia 3 region were estimated for 2025 Q1. Available jobs are defined as the current job openings in the region, and were quantified by industry sector, pay range, and education requirement.

- Of the 15,383 job openings in the region in 2025 Q1, over a third (36%) were in the health care and social assistance sector. The next-largest number of openings was in the retail trade sector (12%), followed by accommodation and food services (8%).
- Job openings in GO Virginia Region 3 are skewed toward mid-to-high-wage jobs.
 - More than one-fifth of the region's job openings (21%) were in the \$15.00-\$17.99 per hour range which is consistent with the large number of openings in the retail and food services sectors. Occupations such as retail salespersons, first-line supervisors of retail sales workers, and first-line supervisors of food preparation workers were highly represented in this range.
 - More than 19% of jobs pay between \$30.00 and \$39.99 per hour due to the high prevalence of registered nurse job postings, which account for 41% of the openings in this range.
- While the majority of job openings in the region can support families with fewer than two children, families with three children or with two children but only one earner have a harder time supporting their basic needs.
 - Based on job openings in the region in 2025 Q1, 100% of available jobs can support one-adult families without children, two working adult families without children, and 99% can support two working adult families with one child.
 - As the number of adults or children increases, however, so do the wages necessary to support those family members. For example, for a family with three children, only 30% of available jobs can support this family with one adult, and 38% of jobs can support two adults (1 working). If a family has two working adults and three children, however, 64% of available jobs can support them due to having a dual income.
- More than three-fifths of job openings in the region (60.5%) do not require any post-secondary education. This is compared with 43.1% of openings statewide indicating that job openings in the GO Virginia 3 region tend to be low-skilled positions that do not require college or higher degrees.

Using the RTI database, Chmura also analyzed the quality and quantity of jobs in the controlled environment agriculture industry and the advanced manufacturing industry, which are both targeted, expanding industries in the region.

- There is one company in the GO Virginia Region 3 controlled environment agriculture industry, AeroFarms, with 48 job openings.
 - Almost 30% (29.2%) of the job openings in controlled environment agriculture were in the \$20.00 to \$24.99 wage range. This was followed by the \$25.00 to \$29.00 range and the \$30.00 to \$39.00 range with 16.7% of openings each.
 - Six family types in the controlled environment agriculture industry had a higher percentage of living wage jobs available in this industry than the region overall, and four family types had a lower percentage of living wage jobs available.
- There were 910 job openings in the manufacturing sector in the GO Virginia 3 region during 2025 Q1, accounting for 6% of total job posts.

- The most job openings were in the \$20.00 to \$24.99 wage range with 22.5% of openings. This was followed by the \$15.00 to \$17.99 wage range (20.9%) and the \$18.00 to \$19.99 wage range (15.0%). Manufacturing wages less prevalent in the lowest and highest wage ranges and more concentrated in the middle wage ranges than the region overall.
- The manufacturing sector performed better than the region overall for only one family type (2 adults, one working with no children) but worse for nine family types, with families with more than one child generally having a lower availability of living wage jobs than the region overall due to the higher prevalence of high-paid jobs in the region overall compared to the sector.

Chmura repeated this analysis for June 2025 and June 2017 to compare the availability of living wage jobs in the current year with the outcomes of the previous DRRC study.

- In June 2017, job postings were more concentrated in lower-wage sectors than in June 2025.
 - Of the 7,843 job openings in the region in June 2025, over a third (36%) were in the health care and social assistance sector. The next-largest number of openings was in the retail trade sector (16%), followed by accommodation and food services (11%).
 - In June 2017, the largest sector by job openings was the retail trade sector with 30% of job openings. This was followed by the healthcare and social assistance sector (18%) and the accommodation and food service sector (13%).
- Job openings in June 2017 skewed towards the lower end of the wage ranges, while in June 2025, they were more concentrated in the mid-to-high wage ranges.
 - In June 2025, 23.5% of job openings specified a wage in the \$15.00 to \$17.99 range, 18.9% were in the \$30.00 to \$39.00 wage range, and 14.6% were in the \$40.00 and up range.
 - In June 2017, 23.8% of job openings were in the \$9.00 to \$10.99 wage range, 15.5% were in the \$15.00 to \$17.99 wage range, and 14.9% were in the \$11.00 to \$12.99 wage range.
- Living wage jobs availability was higher in June 2025 than in June 2017.
 - All of the family types performed better in June 2025 than in June 2017 except for families with two adults without children, for which 100% job postings could support a living wage in both periods.
- Although job posts in June 2025 were still most concentrated in occupations that did no formal educational credential or high school degree or equivalent (49.9%), they were less concentrated than in June 2017 (69.5%). A greater proportion of job posts required a bachelor's degree in June 2025 (23.5%) than in June 2017 (14.7%). This suggests that the GO Virginia 3 region has made progress on transitioning from lower-wage, lower-skilled jobs to higher-wage, higher-skilled jobs.

Chmura used its proprietary JobsEQ technology platform to evaluate whether the GO Virginia 3 region has the capacity to fill living wage jobs and determined that the fundamental challenge for the region is to expand job opportunities for residents.

- In 2025 Q1, the GO Virginia 3 region has an estimated available workforce of 14,483. With open positions of 15,383, this indicates that the total number of available positions exceeds the available workforce by 900 in the region.
 - The GO Virginia 3 region has an estimated pool of 434 healthcare practitioners and technical workers (unemployed plus new entries) and 3,854 job openings for healthcare practitioners and technical occupations, leaving a massive labor shortage of 3,420 highlighting the difficulty of finding qualified candidates for healthcare-related roles.
 - For occupation groups such as community and social services, management positions, and sales and related positions, job openings surpass the number of available workers by over 250.
 - There are, however, some occupation groups, including production workers, where the available workforce exceeds available jobs.

- When filtering for living wage jobs, in 2025 Q1, the GO Virginia 3 region had 13,899 open positions above a living wage of \$14.56, which was 584 less than the available workforce of 14,483, indicating a surplus of workers looking for jobs that can be supported by a living wage.
 - Sales and related workers, which exhibited a labor shortage before filtering, had a surplus of 111 workers after filtering.
 - Lower wage fields such as food preparation and serving related positions, building and grounds cleaning and maintenance occupations, transportation and material moving occupations, and administrative support occupations expanded their surpluses by over 100 workers, suggesting that job quality is still an area for improvement in the region.

Finally, Chmura analyzed the five-year forecasted labor demand in the GO Virginia 3 region and evaluated the forecasts by wage range and education requirements.

- Over the next five years, the industries with the highest forecasted demand include healthcare and social assistance (17.3% of total regional demand), retail trade (13.8%), and accommodation and food services (13.8%).
- Forecasted demand over the next five years is skewed towards the low-to-mid-range wage bands, highlighting the need for growth in higher-paid areas in the region.
 - Forecasted demand is highest for the \$13.00 to \$14.99 wage range jobs, which include high-turnover occupations such as fast-food workers and retail cashiers.
- Total forecasted demand is highest for positions that do not require a post-secondary education, suggesting an oversaturation of high-turnover, low wage positions in GO Virginia region 3.
- Despite lower total demand due to lower turnover, occupations with higher wages and higher education requirements, such as nurse practitioners, are expected to grow over the next five years, highlighting progress being made on job quality in the region.

2. Background

In 2016, the Institute for Advanced Learning and Research (IALR), on behalf of the Dan River Region Collaborative (DRRC), engaged Chmura Economics & Analytics in a study of “good jobs” in the region. The scope of the study included creating a living wage model better suited for Southern Virginia than the MIT living wage calculator, quantifying jobs in the region by industry, wage-band, and education requirement, and evaluating the region’s capacity to provide living wage jobs. Since 2016, along with the significant macroeconomic drivers such as the Covid-19 pandemic and related recession, and rising inflation, there have been several regional developments, with advanced manufacturing employers locating and expanding in Southern Virginia. In order to assess the capacity and needs of the region, Chmura is updating the report to account for these economic developments in the GO Virginia 3 region. The overall research objective can be separated into the following research objectives:

1. Evaluate existing living wage calculations for the region (by locality) and propose a method for improving the estimation of living wages.
2. Estimate the available jobs by industry sector for different wage levels and minimum education requirements.
3. Evaluate the capacity of the region to fulfill the needs of those “good jobs.”
4. Forecast labor demand in the region over the next five years with respect to wage levels and minimum education requirements.

Chmura Economics & Analytics (Chmura) was contracted to conduct this research. The remainder of this report is organized as follows:

- Section 3 reports the estimation of living wage for the GO Virginia 3 region.
- Section 4 estimates the available jobs in 2025 Q1 by industry sector, different wage levels, and minimum education requirements as well as specifically for the controlled environment agriculture sector and the advanced manufacturing sector.
- Section 5 repeats the analysis from section 4 for June 2025 and June 2017 to compare current trends with those of the original study period.
- Section 6 assesses the capacity of the region to fill living wage jobs.
- Section 7 summarizes the forecasted 5-year demand in the region by wage level and educational requirement.

3. Living Wage of the GO Virginia 3 Region

3.1. Basic Annual Living Expenses of Families

Living wage is defined as a wage rate (either annual or hourly) that can support the basic needs of a family. As a result, the first step in estimating a living wage is to understand the basic needs of a family. After the amount of money to fulfill the basic needs of a family is determined, that amount can be converted into annual or hourly wages.

Consistent with other methodologies, Chmura assumes that the basic needs of a family consist of the following categories: food, housing, healthcare, childcare, transportation, and other necessities. There is no surplus funding for savings, vacations, and other entertainment.

Family composition affects basic living expenses. Thus, Chmura will estimate living expenses in the GO Virginia 3 Region for the following 12 family types:

- 1 adult
- 1 adult and 1 child
- 1 adult and 2 children
- 1 adult and 3 children
- 2 adults (one working)
- 2 adults (one working) and 1 child
- 2 adults (one working) and 2 children
- 2 adults (one working) and 3 children
- 2 adults (both working)
- 2 adults (both working) and 1 child
- 2 adults (both working) and 2 children
- 2 adults (both working) and 3 children

Chmura's estimates will be compared to popular indices such as the MIT living wages, the Economic Policy Institute (EPI) living wages, and the University of Washington self-sufficiency wages. Consistent with other methodologies, Chmura assumes that working adults will be working full-time, which equates to 2,080 working hours per year.¹ The age of children has a significant impact on the cost of childcare. Based on the Chmura survey, it is assumed that for families with two adults and one child, the child is ten years old. But for families with one adult and one child, the child is three years old.² For families with two children, the ages of children are assumed to be seven and ten. For families with three children, the ages of the children are assumed to be four, ten, and fourteen. Compared with other tools, Chmura's assumptions, which are based on a survey of the Dan River Region's residents in 2016, are more representative of the age composition of the region's families.

Living expenses are estimated for 2024. If the source data are not available for 2024, Chmura will use the consumer price index (CPI) in adjusting to 2024 levels.

3.1.1. Food

The estimate for the food expenses was retrieved from the USDA Food Plan, by the USDA Center for Nutrition Policy and Promotion.³ The USDA estimates of food costs are used in programs such as Supplemental Nutrition Assistance Program (SNAP), thus are recognized as the required costs to satisfy the basic needs of a family.⁴ The USDA Food Plan estimates the cost of food for all meals prepared

¹ Chmura will discuss implications for part-time workers in Section 3.2.

² This assumption was requested by DRRC during the 2016 study to understand the living wage of a single parent with young child.

³ This is the same source used by the MIT and the EPI living wage calculator.

⁴ Source: USDA Food Plans: Cost of Food. United States Department of Agriculture Center for Nutrition Policy and Promotion. Available at: <https://www.fns.usda.gov/research/cnpp/usda-food-plans/cost-food-monthly-reports>

at home, assuming families on basic budgets do not eat out at restaurants. Chmura used July 2024 data in this analysis, as the July data represent the annual average for 2024.⁵

The USDA data have average monthly food costs for children and adults based on gender and age groups. The at-home food costs are estimated for a family of four, but the USDA also provided guidance to estimate the food costs for larger or smaller families. Considering there are some types of economies of scale, adults and children will have different per capita food costs depending on family size.⁶ USDA estimates are only available for the national average. Chmura further uses the latest cost of living index to estimate food costs for the GO Virginia 3 Region. Chmura did not further adjust for the difference between Danville and Pittsylvania County or between Henry County and Martinsville, because those areas are relatively compact and residents in those localities can easily shop for food in the other locality and vice versa. So, those households are likely to face the same food prices.

Table 3.1 presents the estimated annual food costs for the GO Virginia 3 Region in 2024. At the regional level, the estimated annual food cost in 2024 ranged from \$3,876 for 1-adult families to \$13,828 for families with two adults and three children.

Table 3.1: Estimated Annual Food Costs-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|-----------------|
| 1 Adult | \$4,072 | \$4,162 | \$3,876 |
| 1 Adult 1 Child | \$5,982 | \$6,113 | \$5,694 |
| 1 Adult 2 Children | \$8,954 | \$9,150 | \$8,523 |
| 1 Adult 3 Children | \$11,897 | \$12,158 | \$11,325 |
| 2 Adults (1 working) | \$7,466 | \$7,630 | \$7,107 |
| 2 Adults (1 working) 1 Child | \$9,274 | \$9,477 | \$8,827 |
| 2 Adults (1 working) 2 Children | \$11,921 | \$12,182 | \$11,347 |
| 2 Adults (1 working) 3 Children | \$14,526 | \$14,845 | \$13,828 |
| 2 Adults | \$7,466 | \$7,630 | \$7,107 |
| 2 Adults 1 Child | \$9,274 | \$9,477 | \$8,827 |
| 2 Adults 2 Children | \$11,921 | \$12,182 | \$11,347 |
| 2 Adults 3 Children | \$14,526 | \$14,845 | \$13,828 |

Source: Chmura Economics and Analytics

3.1.2. Housing

Housing costs are estimated using fair market rent levels (FMRs) published by the U.S. Department of Housing and Urban Development (HUD).⁷ FMRs are gross rent estimates. They include the shelter rent plus the cost of all tenant-paid utilities such as electricity, water, and sewer. But FMRs do not include costs for telephone, cable or satellite television, or internet service. The current definition of FMRs for each region uses the 40th percentile rent in that market, implying that FMRs represent a rent below which 40 percent of the standard-quality rental housing units are rented.⁸ The HUD FMRs provide rental rates for five dwelling units: efficiency, one-bedroom, two-bedroom, three-bedroom, and four-bedroom.

In calculating the basic housing cost for the GO Virginia 3 Region, it is assumed that all families are renters. The rationale for this assumption is that families on a basic budget spend all of their income on basic needs, and there is no surplus to save for a down payment to purchase a house. In addition, sharing of bedrooms is needed for family members since families are on a basic budget. Consistent with other tools, Chmura assumes that a one-adult family would rent an efficiency unit (zero bedroom). A two-adult family would rent a one-bedroom apartment. Families with one child or two children will rent a two-bedroom apartment, and families with three children would rent a three-bedroom apartment.

The HUD estimates are available for Bureau of Economic Analysis (BEA) economic areas. While BEA economic areas are generally consistent with counties or cities, they sometimes combine some localities. For example, BEA treats the city of Danville and Pittsylvania County as one economic area, and the city of Martinsville and Henry County as its own economic area. Chmura further uses the latest home value data to differentiate rents between Danville and Pittsylvania County, and between Martinsville and Henry County. Chmura assumes that areas with high-value homes will have higher apartment rents as well.

⁵ Due to inflation in food prices, data from early months tend to be less than the annual average, and data from later months tend to be higher than the annual average. As a result, the mid-year data are closest to the annual average.

⁶ For example, a larger family can buy bulk or family-size food items, resulting in a lower average cost. As a result, a child living in a smaller household has a higher food cost than the same child living in a larger household.

⁷ This is the same source used by the MIT and the EPI living wage calculators.

⁸ Source: Fair Market Rents For the Section 8 Housing Assistance Payment Programs, U.S. Department of Housing and Urban Development, Office of Policy Development & Research. Available at: <https://www.huduser.gov/portal/datasets/fmr.html#year2024>

Table 3.2 presents the estimated annual housing costs for counties and cities in the Dan River Region. At the regional level, the estimated annual housing costs in 2024 ranged from \$8,465 for 1-adult families to \$14,261 for families with three children.

3.1.3. Child Care

For families with children, childcare is a major responsibility. Chmura assumes that for families with one adult, this person works full-time and pays someone else to care for the children. The same assumption applies for 2-adult families where both adults are working. For families with two adults but only one is working, Chmura assumes that the non-working adult takes care of the children at home.

Childcare costs vary greatly by the age of the children being cared for. Based on the Chmura survey, it is assumed that for one-child families with two adults, the age of the child is ten. For a family with one adult and one child, the age of the child is three. For households with two children, the ages of the children are assumed to be seven and ten. For families with three children, the ages of the children are assumed to be four, ten, and fourteen. In terms of childcare cost, it is assumed that children over the age of 13 will not need arrangements for childcare, while a young child (below 5) needs full-time care, and school-aged children (5-13) only need care after school and in summertime.

Basic childcare cost data are from Child Care Aware of America.⁹ This is the data source used by the MIT and EPI cost of living calculators as well. Child Care Aware of America is the national clearinghouse for childcare-related resources, providing information on childcare costs for both center-based care and family care for children of different ages—infants, preschoolers, and school-aged children. Chmura chose to use the cost of family care, as this option is more affordable for parents. In addition, the latest data from Child Care Aware of America are for the childcare costs in 2023. Chmura used the consumer price index (CPI) to estimate the 2024 cost. Since only the state-level data are available, Chmura used the cost-of-living index to estimate the local childcare cost based on Virginia statewide data. Chmura did not further adjust the difference between Danville and Pittsylvania County or between Henry County and Martinsville, because those areas are geographically close and people in Danville can choose childcare facilities in Pittsylvania County and vice versa.

Table 3.3 summarizes the estimated annual childcare costs for counties and cities in the GO Virginia 3 Region in 2024. At the regional level, the estimated annual childcare cost was \$0 for families without any children or for families with one adult staying at home to care for their children. The highest cost occurred for families with three children who have to pay for childcare. The estimated childcare cost was \$14,785 for those families.

Table 3.2: Estimated Annual Housing Costs-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|-----------------|
| 1 Adult | \$10,859 | \$13,136 | \$8,465 |
| 1 Adult 1 Child | \$14,180 | \$17,154 | \$11,055 |
| 1 Adult 2 Children | \$14,180 | \$17,154 | \$11,055 |
| 1 Adult 3 Children | \$18,293 | \$22,129 | \$14,261 |
| 2 Adults (1 working) | \$11,558 | \$13,982 | \$9,010 |
| 2 Adults (1 working) 1 Child | \$14,180 | \$17,154 | \$11,055 |
| 2 Adults (1 working) 2 Children | \$14,180 | \$17,154 | \$11,055 |
| 2 Adults (1 working) 3 Children | \$18,293 | \$22,129 | \$14,261 |
| 2 Adults | \$11,558 | \$13,982 | \$9,010 |
| 2 Adults 1 Child | \$14,180 | \$17,154 | \$11,055 |
| 2 Adults 2 Children | \$14,180 | \$17,154 | \$11,055 |
| 2 Adults 3 Children | \$18,293 | \$22,129 | \$14,261 |

Source: Chmura Economics and Analytics

Table 3.3: Estimated Annual Childcare Costs-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|-----------------|
| 1 Adult | \$0 | \$0 | \$0 |
| 1 Adult 1 Child | \$9,939 | \$11,050 | \$9,371 |
| 1 Adult 2 Children | \$11,487 | \$12,770 | \$10,830 |
| 1 Adult 3 Children | \$15,682 | \$17,434 | \$14,785 |
| 2 Adults (1 working) | \$0 | \$0 | \$0 |
| 2 Adults (1 working) 1 Child | \$0 | \$0 | \$0 |
| 2 Adults (1 working) 2 Children | \$0 | \$0 | \$0 |
| 2 Adults (1 working) 3 Children | \$0 | \$0 | \$0 |
| 2 Adults | \$0 | \$0 | \$0 |
| 2 Adults 1 Child | \$5,743 | \$6,385 | \$5,415 |
| 2 Adults 2 Children | \$11,487 | \$12,770 | \$10,830 |
| 2 Adults 3 Children | \$15,682 | \$17,434 | \$14,785 |

Source: Chmura Economics and Analytics

⁹ Source: Child Care at a Standstill: Price and Landscape Analysis 2023. Available at: <https://www.childcareaware.org/thechildcarestandstill/#PriceofCare>

3.1.4. Healthcare

Healthcare costs include two major components—the health insurance premium and out-of-pocket costs for medical services—including prescription drugs, doctor's visits, and hospital visits. The magnitude of a family's healthcare costs thus depends on whether the family has employment-based health insurance or purchased insurance in the private market or in the healthcare exchange market established by the Affordable Care Act (ACA). Even for families with the same type of insurance, the difference in coverage or deductibles will still affect healthcare costs significantly.

The EPI living wage model utilized the health premiums from the ACA health exchange. However, using the ACA insurance premium is not accurate because the majority of American families receive insurance through their employers. For this reason, both the MIT and UW models utilized employment-based insurance premiums retrieved from the Medical Expenditure Panel Survey (MEPS).¹⁰ In Virginia, 52% of the population was insured through employer-based plans in 2023.¹¹ As a result, Chmura also used the employment-based insurance premium in estimating basic healthcare expenses.

For out-of-pocket expenses, both the EPI and UW models used data from MEPS. However, the MIT calculator utilized medical expenses from the consumer expenditure survey (CES). Chmura decided to use MEPS Household Component data for out-of-pocket expenditures. Since this data is only available by macro regions, an estimate for Virginia was created using an average of the South and Northeast regions.

For health insurance premiums, MEPS provided employee contributions to premiums for three categories: single coverage, single plus one coverage, and family coverage. Chmura assumes that a 1-adult family will pay the premium for single coverage. For 2-person households (2 adults or 1 adult plus one child), the insurance cost will be the single plus one premium. For all other families, their insurance cost is the family coverage premium.¹² Because the state-level data are only available for 2020, Chmura estimated 2024 costs using the CPI for healthcare.

For out-of-pocket costs, the state-level data are only available for 2020, but the national data are available for 2022. Chmura first estimated Virginia 2022 costs based on changes in national out-of-pocket costs from 2020 to 2022, and calculated 2024 costs using the CPI for healthcare. Chmura then utilized the regional cost-of-living index to adjust healthcare costs at the regional level. Chmura did not further adjust for the difference between Danville and Pittsylvania County or between Henry County and Martinsville, because those areas are geographically close and residents in one locality can seek healthcare services in neighboring counties.

Table 3.4 summarizes the estimated annual healthcare costs for counties and cities in the GO Virginia 3 Region in 2024. At the regional level, the estimated annual healthcare cost ranged from \$2,641 for a one-adult family to \$9,418 for families with two adults and three children.

Table 3.4: Estimated Annual Healthcare Costs-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|----------------|
| 1 Adult | \$2,655 | \$2,808 | \$2,641 |
| 1 Adult 1 Child | \$5,024 | \$5,314 | \$4,997 |
| 1 Adult 2 Children | \$8,156 | \$8,627 | \$8,112 |
| 1 Adult 3 Children | \$8,559 | \$9,053 | \$8,513 |
| 2 Adults (1 working) | \$5,757 | \$6,089 | \$5,726 |
| 2 Adults (1 working) 1 Child | \$8,664 | \$9,163 | \$8,617 |
| 2 Adults (1 working) 2 Children | \$9,067 | \$9,590 | \$9,018 |
| 2 Adults (1 working) 3 Children | \$9,470 | \$10,016 | \$9,418 |
| 2 Adults | \$5,757 | \$6,089 | \$5,726 |
| 2 Adults 1 Child | \$8,664 | \$9,163 | \$8,617 |
| 2 Adults 2 Children | \$9,067 | \$9,590 | \$9,018 |
| 2 Adults 3 Children | \$9,470 | \$10,016 | \$9,418 |

Source: Chmura Economics and Analytics

¹⁰ Source: Department of Health and Human Services, Agency for Healthcare Research and Quality, Medical Expenditure Panel Survey. Available at: <https://meps.ahrq.gov/mepsweb/>

¹¹ Source: Health Insurance Coverage of the Total Population, Kaiser Family Foundation, available at: <http://kff.org/other/state-indicator/total-population/?currentTimeframe=0#notes>

¹² This is consistent with the assumptions made by the MIT calculator.

3.1.5. Transportation

Chmura's transportation costs were estimated differently from other calculators. The EPI model computed non-social trips (based on estimated miles traveled to work, grocery stores, medical appointments, etc.) but it assumes that all families own cars. Therefore, transportation costs could be overstated for those who use public transportation. Another drawback of the EPI calculator is that it does not factor in transportation costs for children, e.g., its estimated transportation costs for one adult with one child, two children, or three children are the same. This is unrealistic because additional children have transportation needs such as doctor's appointments, school, and shopping, which are part of the basic necessities. The MIT calculator, instead, includes the average transportation cost from the 2023 Consumer Expenditure Survey.¹³ This estimation also has some shortcomings, since it tends to overstate the costs for two reasons. First, the CES survey on transportation spending includes leisure travel such as vacations. The premise of a living wage is that vacations are not a basic need and should be excluded. In addition, the CES national number is based on households with a national average income of \$109,211 per year for a 2-person household, and \$146,667 for a 4-person household. Those income levels are too high for families on a basic budget, indicating that the MIT calculator's transportation costs are too high.

Chmura took the following approach to estimate transportation costs for the GO Virginia 3 region. Chmura used CES 2023 data from the Bureau of Labor Statistics as the base for estimation. Chmura only included costs for gasoline and motor oil, other vehicle expenses such as insurance and finance charges, vehicle maintenance and repair, public transportation, and used vehicle purchases. Chmura excluded new car purchases. Chmura used national averages for vehicle-related costs for households in lower income brackets, as opposed to households making average wages.¹⁴ This also moderates the concerns about vacation transportation costs, as low-income households are less likely to take vacations or leisure trips. In addition, Chmura distinguished the transportation costs between children and adults, based on CES data.¹⁵ Finally, Chmura also used the CPI to estimate 2024 costs using CES 2024 data and the cost of living index to estimate local transportation costs.

Chmura further adjusted the transportation cost difference between Danville and Pittsylvania County, and between Henry County and Martinsville. Pittsylvania is the suburban county surrounding the city of Danville. Since Danville is compact and is home to many of the jobs in the region, it is likely that residents in Pittsylvania County will commute longer to work, resulting in higher transportation expenses. Data from the U.S. Census Bureau confirmed that. The average commuting time for Danville is 20 minutes while that for Pittsylvania County is 26 minutes.¹⁶ A difference of six minutes can translate into hundreds of dollars in transportation costs per year, in terms of gasoline and vehicle maintenance costs. Similarly, Chmura used commuting time to differentiate the transportation costs between the city of Martinsville and Henry County.

Table 3.5 summarizes the estimated annual transportation costs for counties and cities in the GO Virginia 3 Region in 2024. At the regional level, the estimated annual transportation cost ranged from \$3,941 for a one-adult family to \$10,349 for families with two working adults and three children.

Table 3.5: Estimated Annual Transportation Costs-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|----------------|
| 1 Adult | \$4,363 | \$4,230 | \$3,941 |
| 1 Adult 1 Child | \$4,650 | \$4,508 | \$4,200 |
| 1 Adult 2 Children | \$5,870 | \$5,690 | \$5,301 |
| 1 Adult 3 Children | \$7,089 | \$6,872 | \$6,402 |
| 2 Adults (1 working) | \$6,548 | \$6,348 | \$5,914 |
| 2 Adults (1 working) 1 Child | \$6,835 | \$6,627 | \$6,173 |
| 2 Adults (1 working) 2 Children | \$8,054 | \$7,808 | \$7,275 |
| 2 Adults (1 working) 3 Children | \$9,274 | \$8,990 | \$8,376 |
| 2 Adults | \$8,733 | \$8,466 | \$7,887 |
| 2 Adults 1 Child | \$9,020 | \$8,745 | \$8,147 |
| 2 Adults 2 Children | \$10,239 | \$9,926 | \$9,248 |
| 2 Adults 3 Children | \$11,458 | \$11,108 | \$10,349 |

Source: Chmura Economics and Analytics

3.1.6. Other Necessities

Different calculators take different approaches to estimating the cost of other necessities. The University of Washington model simply inflates the combined costs of food, housing, childcare, healthcare, and transportation by 10% to 15%, and considers that to be the cost

¹³ Source: Consumer Expenditure Survey, 2023, Table 1400 and Table 1800.

¹⁴ Source: Consumer Expenditure Survey, 2023, Table 1203. Chmura used the average for households in the lower 50% of all U.S. households.

¹⁵ Source: Consumer Expenditure Survey, 2023, Table 1502.

¹⁶ Source: JobsEQ, Demographic Profile.

of other necessities. The EPI model uses a percentage of housing and food costs and applies it to all households to proxy for other necessities. The MIT calculator is more detailed since it is based on the annual consumer expenditure survey. However, the MIT model estimates can overstate the cost of other necessities because it is based on households with national average incomes. In addition, it did not differentiate between the cost of other necessities for adults and children, which can vary greatly. The MIT calculator also did not include utilities such as phones and cell phones.¹⁷

Chmura took the following approach to estimate other necessities cost. Chmura used CES 2023 data from the Bureau of Labor Statistics. Chmura only included the following basic expenses: housekeeping supplies, apparel and services, personal care products and services, reading, and telephone services. Chmura excluded non-necessities such as furniture, entertainment and recreation, and education. To be conservative, Chmura used the average spending of households in the lower half of the income spectrum.¹⁸

Finally, Chmura used the CPI to estimate the 2024 value and the cost-of-living index to estimate the local cost for other necessities. Chmura did not further adjust for the difference between Danville and Pittsylvania County or between Henry County and Martinsville, because those areas are interconnected and residents can travel easily between those localities to shop for those necessities, and thus they are likely to face the same prices.

Table 3.6 summarizes the estimated annual other necessities costs for counties and cities in the GO Virginia 3 Region for 2024. At the regional level, the estimated annual other necessities costs ranged from \$2,419 for a one-adult family to \$6,242 for families with two adults and three children.

Table 3.6: Estimated Annual Other Necessities Costs-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|----------------|
| 1 Adult | \$2,604 | \$2,622 | \$2,419 |
| 1 Adult 1 Child | \$2,637 | \$2,655 | \$2,450 |
| 1 Adult 2 Children | \$3,481 | \$3,504 | \$3,233 |
| 1 Adult 3 Children | \$4,324 | \$4,353 | \$4,016 |
| 2 Adults (1 working) | \$5,000 | \$5,034 | \$4,644 |
| 2 Adults (1 working) 1 Child | \$5,033 | \$5,067 | \$4,675 |
| 2 Adults (1 working) 2 Children | \$5,877 | \$5,916 | \$5,458 |
| 2 Adults (1 working) 3 Children | \$6,720 | \$6,765 | \$6,242 |
| 2 Adults | \$5,000 | \$5,034 | \$4,644 |
| 2 Adults 1 Child | \$5,033 | \$5,067 | \$4,675 |
| 2 Adults 2 Children | \$5,877 | \$5,916 | \$5,458 |
| 2 Adults 3 Children | \$6,720 | \$6,765 | \$6,242 |

Source: Chmura Economics and Analytics

3.1.7. Taxes

Basic living expenses are the expenses remaining after families pay federal, state, and local taxes. There are also different tax burdens for different families, and there are different methods used to calculate the tax burden for each family. The MIT calculator included three tax types: federal income tax, federal payroll tax, and state income tax. However, this model used an effective federal income tax rate for a family of four for all family types, resulting in very similar overall tax rates for all families regardless of composition. This is not accurate because it understates the tax rate for households without children as they will not benefit from tax credits related to having children or childcare expenses. The UW model included federal and state income tax, state sales tax, and calculated tax credits for children separately. On the other hand, the EPI calculator used a composite federal and state tax rate from the National Bureau of Economic Research (NBER) Tax Simulation (TAXSIM) Model, and tax rates are customized to different family types. In addition, the NBER TAXSIM Model incorporated tax exemptions and tax credits related to childcare, thus is a more relevant tax rate for working families.

Chmura chose to follow the EPI model to estimate tax because it provides an accurate estimate of federal and state taxes for all different family types. Chmura also considered three tax types: federal income tax, federal payroll tax, and state income tax. That is because those taxes are withheld from employee paychecks and are not part of their disposable income. Sales tax on food and household supplies is part of the family budget, and is included in the spending items estimated above, and does not need to be paid separately.¹⁹

¹⁷ Basic utilities such as electricity and water are included in the housing cost estimate.

¹⁸ Source: Consumer Expenditure Survey, 2023, Table 1203.

¹⁹ Real estate taxes are not included because it is assumed that households with basic needs do not own homes. In addition, personal property tax is not included because it is assumed that it is included in car ownership cost (which is part of transportation cost).

The federal payroll tax rate for an employee in 2024 is 6.2% for social security and 1.45% for Medicare.²⁰ For federal and state income tax, Chmura applied an effective tax rate from the NBER TAXSIM Model. In estimating the federal and state income tax rate, the NBER model considered the number of adults, the number of children, personal exemptions, and standard deduction, as well as the child tax credit and earned income credit.²¹

Table 3.7 summarizes the estimated annual tax expenses, per family, for counties and cities in the GO Virginia 3 Region in 2024. The tax burden depends on the family type. Adults with children have a lower tax rate due to childcare costs and child tax credits which ultimately reduce their taxes.

Table 3.7: Estimated Annual Tax Payment-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|----------------|
| 1 Adult | \$3,728 | \$4,093 | \$3,240 |
| 1 Adult 1 Child | \$1,325 | \$1,461 | \$1,180 |
| 1 Adult 2 Children | \$5,104 | \$5,571 | \$4,607 |
| 1 Adult 3 Children | \$8,295 | \$9,071 | \$7,471 |
| 2 Adults (1 working) | \$4,671 | \$5,024 | \$4,166 |
| 2 Adults (1 working) 1 Child | \$2,913 | \$3,145 | \$2,606 |
| 2 Adults (1 working) 2 Children | \$4,461 | \$4,783 | \$4,011 |
| 2 Adults (1 working) 3 Children | \$6,031 | \$6,493 | \$5,394 |
| 2 Adults | \$5,408 | \$5,785 | \$4,827 |
| 2 Adults 1 Child | \$5,992 | \$6,462 | \$5,394 |
| 2 Adults 2 Children | \$7,658 | \$8,240 | \$6,949 |
| 2 Adults 3 Children | \$10,571 | \$11,424 | \$9,562 |

Source: Chmura Economics and Analytics

3.1.8. Total Annual Living Wages

After adding all basic living expenses and tax burdens together, Table 3.8 summarizes the estimated annual pre-tax wages needed to support basic living expenses for families in the GO Virginia 3 Region localities. At the regional level, estimated annual living expenses range from \$24,582 for a one-adult family to \$78,445 for families with two working adults and three children.

For working families in the GO Virginia 3 Region, housing is typically the largest expense item in the family budget (Figure 3.1). However, for families with one adult and two children, childcare is the largest spending item. For families without children or without childcare expenses, the cost of food is typically the second-highest spending item. Figure 3.1 lists the spending pattern for each family type, based on the regional averages.

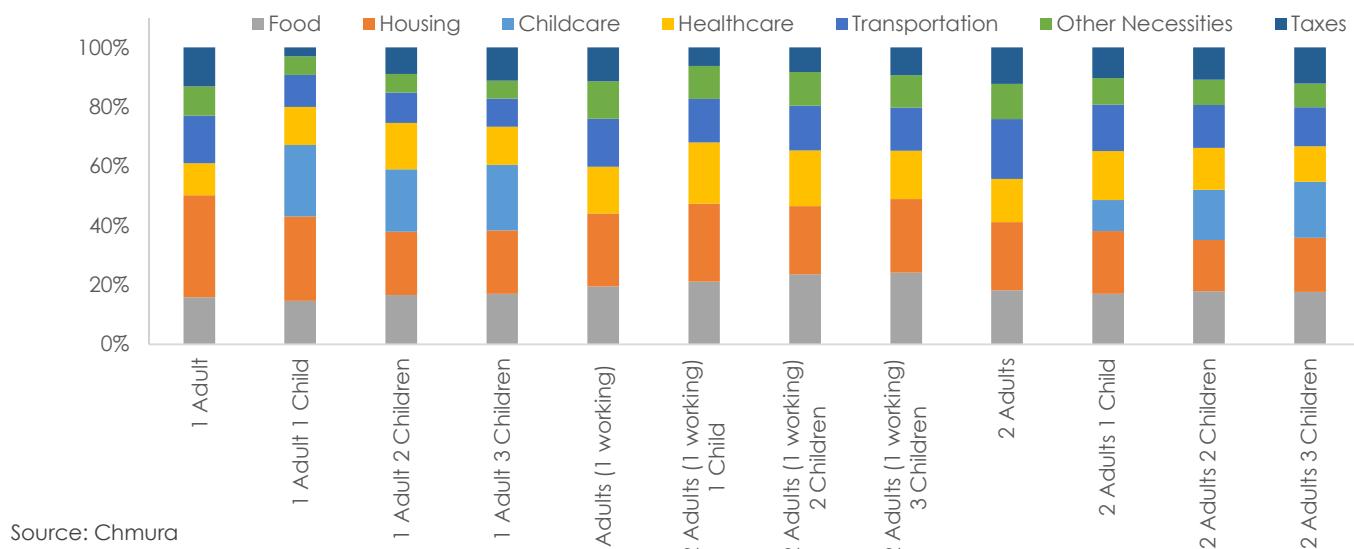
Table 3.8: Estimated Annual Living Wage-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|-----------------|
| 1 Adult | \$28,281 | \$31,050 | \$24,582 |
| 1 Adult 1 Child | \$43,739 | \$48,257 | \$38,947 |
| 1 Adult 2 Children | \$57,231 | \$62,466 | \$51,661 |
| 1 Adult 3 Children | \$74,140 | \$81,071 | \$66,774 |
| 2 Adults (1 working) | \$40,999 | \$44,106 | \$36,567 |
| 2 Adults (1 working) 1 Child | \$46,900 | \$50,634 | \$41,954 |
| 2 Adults (1 working) 2 Children | \$53,559 | \$57,434 | \$48,164 |
| 2 Adults (1 working) 3 Children | \$64,313 | \$69,238 | \$57,518 |
| 2 Adults | \$43,921 | \$46,985 | \$39,201 |
| 2 Adults 1 Child | \$57,906 | \$62,454 | \$52,130 |
| 2 Adults 2 Children | \$70,428 | \$75,779 | \$63,904 |
| 2 Adults 3 Children | \$86,720 | \$93,722 | \$78,445 |

Source: Chmura Economics and Analytics

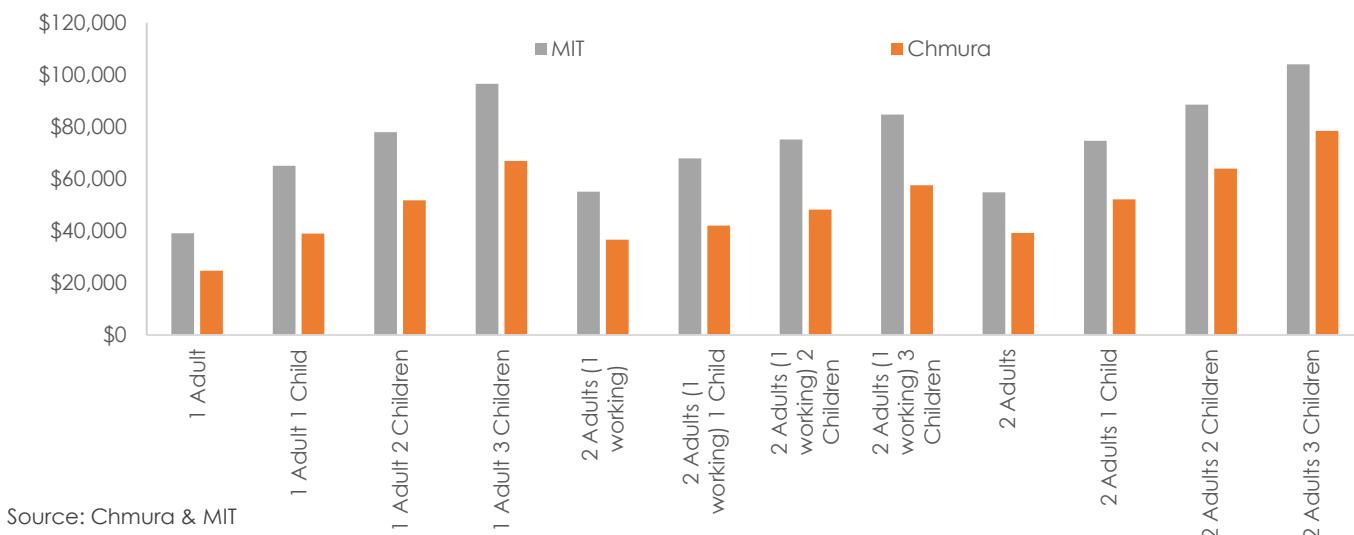
²⁰ This is just the employee responsibility. The employer will also pay the same amount to the federal government. Source: Internal Revenue Service <https://www.irs.gov/publications/p15/ar01.html>.

²¹ Source: National Bureau of Economic Research, Internet TAXSIM Version 9. <http://users.nber.org/~taxsim/taxsim-calc9/index.html>.

Figure 3.1: Distribution of Spending Categories

Source: Chmura

Since the MIT calculator is well known and widely used around the country, Figure 3.2 compared the Chmura estimates with the estimates from the MIT calculator. Chmura's average annual living expenses for all families are consistently lower than those estimated by the MIT calculator due to the cost-of-living adjustment. As mentioned before, the MIT calculator used national and state averages for several key spending items, such as food, childcare, transportation, and other necessities. It did not take into consideration that the cost of living in GO Virginia Region 3 is lower than the national and state average. As a result, the required living expenses for families in the region should be lower. The other differences can be attributed to different data sources (healthcare costs, for example) and different estimating methodology. For example, the MIT calculation of transportation and other necessities costs used the expenditure for households making mean incomes, while Chmura's estimate used the average for households with incomes in the lower half of all households.

Figure 3.2: Comparison with MIT Calculator

Source: Chmura & MIT

3.2. Estimating Living Wages by Households

After annual minimum living expenses were calculated for each family type and each locality, Chmura converted them into a pre-tax hourly wage rate, assuming individuals work full time (2,080 hours per year).

In estimating living wages, Chmura assumes that each household is responsible for its own expenses and did not consider other financial support. For example, for a single parent with children, Chmura does not consider whether the single parent receives child support from other sources. In addition, some families may be eligible for public assistance programs. Public assistance was not considered in this analysis.

As Table 3.9 shows, the living wage is lowest for a family with two working adults without children. For them, the living wage is \$9.42 per hour. Only this family type and one adult families with no children can meet basic needs with the state minimum wage of \$12.41 per hour. The highest living wage is for one adult with three children, which is estimated to be \$32.10 per hour.

IALR also desires to understand the estimated living wages for full-time and part-time workers. The key difference is healthcare costs. The healthcare cost estimate in Section 3.1.4. includes the assumption that employers pay a portion of the health insurance premium. But for part-time workers who do not have employment-based health insurance, they will not have this benefit. For those individuals, they will need to purchase health insurance from the individual insurance market because the Patient Protection and Affordable Care Act (ACA) requires everyone to have insurance.²² ACA also offers premium subsidies to households with moderate incomes.²³ Since households with living wages have incomes only sufficient to cover basic living expenses, they will be eligible for a premium credit. Chmura used the ACA tools from the Kaiser Family Foundation to estimate the health insurance premium for part-time workers in Virginia.²⁴ It turns out that all households purchasing insurance from the ACA health exchange can get a lower premium cost, after factoring premium subsidies, than they would have to pay with employment-based insurance. As a result, the resulting living wages for part-time workers are slightly lower than living wages for full-time workers.

Table 3.10 shows the living wages for part-time workers in the GO Virginia 3 Region. The living wage is lowest for a family with two working adults without children, at \$8.71 per hour. The highest living wage is for one adult with three children, which is estimated to be \$29.95 per hour.

Table 3.9: Estimated Annual Living Wage-2024

| Family Type | National | Virginia | GO VA Region 3 |
|---------------------------------|----------|----------|----------------|
| 1 Adult | \$13.60 | \$14.93 | \$11.82 |
| 1 Adult 1 Child | \$21.03 | \$23.20 | \$18.72 |
| 1 Adult 2 Children | \$27.51 | \$30.03 | \$24.84 |
| 1 Adult 3 Children | \$35.64 | \$38.98 | \$32.10 |
| 2 Adults (1 working) | \$19.71 | \$21.21 | \$17.58 |
| 2 Adults (1 working) 1 Child | \$22.55 | \$24.34 | \$20.17 |
| 2 Adults (1 working) 2 Children | \$25.75 | \$27.61 | \$23.16 |
| 2 Adults (1 working) 3 Children | \$30.92 | \$33.29 | \$27.65 |
| 2 Adults | \$10.56 | \$11.29 | \$9.42 |
| 2 Adults 1 Child | \$13.92 | \$15.01 | \$12.53 |
| 2 Adults 2 Children | \$16.93 | \$18.22 | \$15.36 |
| 2 Adults 3 Children | \$20.85 | \$22.53 | \$18.86 |

Source: Chmura Economics and Analytics

Table 3.10: Estimated Annual Living Wage-Part-Time-2024

| Family Type | GO VA Region 3 |
|---------------------------------|----------------|
| 1 Adult | \$11.11 |
| 1 Adult 1 Child | \$17.03 |
| 1 Adult 2 Children | \$22.28 |
| 1 Adult 3 Children | \$29.95 |
| 2 Adults (1 working) | \$16.02 |
| 2 Adults (1 working) 1 Child | \$17.16 |
| 2 Adults (1 working) 2 Children | \$20.09 |
| 2 Adults (1 working) 3 Children | \$24.65 |
| 2 Adults | \$8.71 |
| 2 Adults 1 Child | \$11.26 |
| 2 Adults 2 Children | \$14.20 |
| 2 Adults 3 Children | \$17.89 |

Source: Chmura Economics and Analytics

²² ACA is often referred to as Obamacare by the news media. However, with the Trump Administration taking office, the fate of ACA is not clear at the time of this report. The law could be repealed, or replaced with different plans. It is not clear whether the individual mandate or premium subsidy will be retained. The analysis in this section assumes ACA remains in effect.

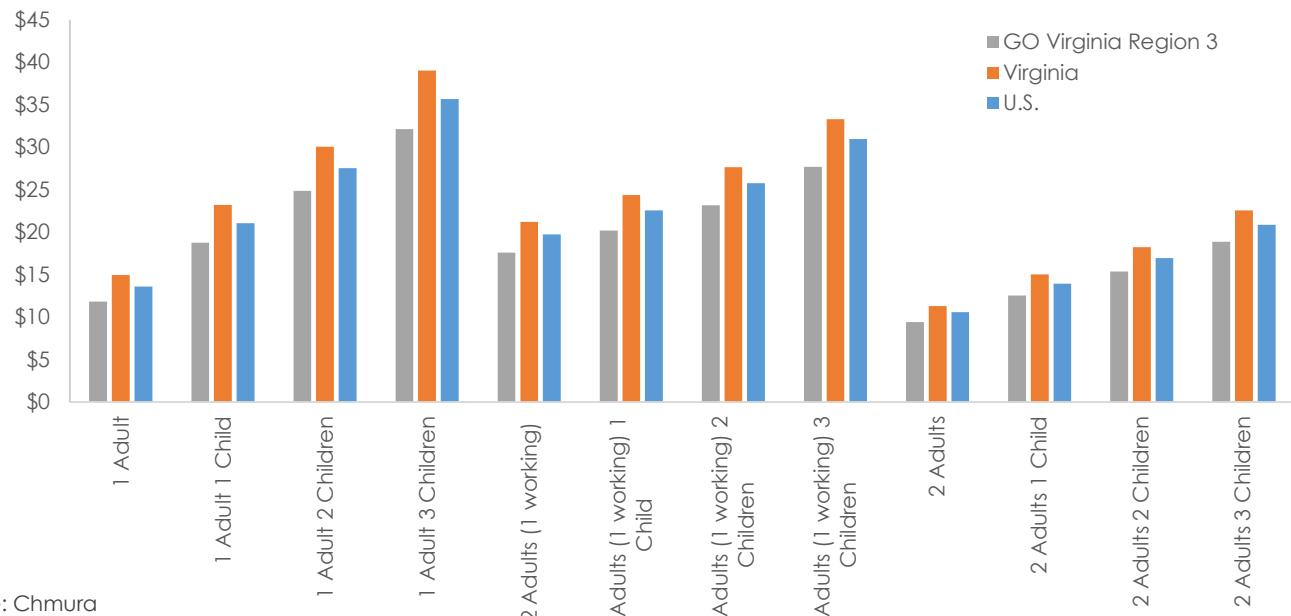
²³ For example, ACA provides premium credits for incomes up to four times the federal poverty line. The amount of the credit depends on household income.

²⁴ Source: Kaiser Family Foundation. This is calculated for each locality based on family type. <https://www.kff.org/interactive/subsidy-calculator/>

3.3. Comparison with State and National Living Wages

Chmura also estimated the state and national living wages and compared them with the GO Virginia 3 Region average. In general, living wages in the GO Virginia 3 Region are lower than both state and national levels for all family types. The regional living wage average (hourly wages) was estimated at \$14.56 in 2024. This is \$3.08 lower than the state average and \$1.76 lower than the national average, due to the lower cost of living in the GO Virginia 3 Region. This translates into lower costs for food, housing, transportation, and other spending items.

Figure 3.3: Comparison with Virginia and National Living Wages



Source: Chmura

4. Jobs Availability in the GO Virginia 3 Region

In this section, Chmura estimates the quantity and quality of available jobs in the GO Virginia 3 Region in 2025 Q1. Available jobs are defined as the current job openings in the region, and were quantified by industry sector, pay range, and education requirement.

4.1. Job Availability by Industry Sector & Employers

In the first quarter of 2025, there were 15,383 job openings in the GO Virginia 3 Region. These data were collected via “spidering” online job posting sites to collect information regarding available jobs.²⁵ With the current employment of 131,176 in the region, there is one job opening per 9 current workers. As a comparison, there is one job opening per 10 current workers in the state of Virginia. This indicates that job availability seems to be slightly more plentiful in the GO Virginia 3 Region than in the state of Virginia.

4.1.1. Job Availability by Industry Sector

Chmura’s RTI database on job openings collected data on position titles.

Those position titles enabled Chmura to classify available jobs into detailed occupations based on Standard Occupation Code (SOC) codes from the O*Net database.²⁶ Afterward, Chmura utilized the region’s industry-occupation matrix to estimate the number of job openings in industries based on two-digit and six-digit North American Industry Classification System (NA-ICS) codes.²⁷

Table 4.1 presents job availability by industry sector. Data indicate that the health care and social assistance sector had the largest number of job openings in the first quarter of 2025, with more than one-third of job openings in the region (35.8%). The healthcare industry includes hospitals, medical offices, and dental offices. It also includes businesses such as nursing homes and mental health establishments. Healthcare is a growing industry in the region with adequate job opportunities. Some of the occupations with a lot of openings are

Table 4.1: GO Virginia Region 3 Job Openings by Industry Sector, 2025 Q1

| Sector | Job Openings | Sector Distribution (%) |
|--|---------------|-------------------------|
| | 2025 Q1 | (%) |
| Accommodation and Food Services | 1,242 | 8.1% |
| Administrative Support and Waste Management | 889 | 5.8% |
| Agriculture, Forestry, Fishing and Hunting | 13 | 0.1% |
| Arts, Entertainment, and Recreation | 158 | 1.0% |
| Construction | 1,071 | 7.0% |
| Educational Services | 1,165 | 7.6% |
| Finance and Insurance | 345 | 2.2% |
| Health Care and Social Assistance | 5,514 | 35.8% |
| Information | 110 | 0.7% |
| Management of Companies and Enterprises | 10 | 0.1% |
| Manufacturing | 910 | 5.9% |
| Mining, Quarrying, and Oil and Gas Extraction | 10 | 0.1% |
| Other Services | 172 | 1.1% |
| Professional, Scientific, and Technical Services | 676 | 4.4% |
| Public Administration | 314 | 2.0% |
| Real Estate and Rental and Leasing | 93 | 0.6% |
| Retail Trade | 1,912 | 12.4% |
| Transportation and Warehousing | 553 | 3.6% |
| Utilities | 27 | 0.2% |
| Wholesale Trade | 199 | 1.3% |
| Total | 15,383 | 100.0% |

Source: Chmura Economics & Analytics

²⁵ Counts of unique job postings may not equate with actual job demand. For example, job postings may be placed in anticipation of possible openings that do not materialize. Moreover, slight variations of ads may be placed such that the number of ads exceeds the actual number of openings. In addition, online jobs included were active at any point in the first quarter of 2025. As such, this report may include some ads that were closed as of that date and may include some ads that were first posted prior to the 30-day period.

²⁶ O*Net is a national occupation classification system, sponsored by the U.S. Department of Labor, Employment and Training Administration. Source: <https://www.onetonline.org/>

²⁷ This approach is used because most job postings do not specify an industry. In addition, many advertisements are posted by staffing firms, which will then place workers in different firms or industries.

registered nurses (1,336), physical therapists (364), speech-language pathologists (338), licensed practical and licensed vocational nurses (256), medical and health services managers (231), and critical care nurses (189).

About 12% of all job openings (1,912) in the GO Virginia 3 Region are in the retail trade industry. The retail trade sector includes retail establishments such as grocery stores, department stores, and gas stations. There are two factors that contribute to a large number of job openings—fast job growth due to demand and high turnover. Retail jobs tend to have high turnover rates, where workers often move between similar jobs frequently. Some of the major occupations in retail services with sizable job openings are retail salespersons (511), first-line supervisors of retail sales workers (471), and stockers and order fillers (87).

Accommodation and food services is the third-largest industry in the region based on job openings and accounts for 8% of all job openings (1,242) in GO Virginia Region 3. This sector includes both lodging services, such as hotels, and food service establishments, such as full-service restaurants, fast food restaurants, and bars. Similar to the retail trade sector, the accommodation and food services sector experiences high turnover among employees. Some of the major occupations in this sector with large numbers of job openings are fast food and counter workers (284), first-line supervisors of food preparation and serving workers (281), and food services managers (59).

Other sectors with large amounts of job openings are educational services (1,165), construction (1,071), and manufacturing (910).

4.1.2. Job Availability by Occupation

Table 4.2 shows the top 20 occupations with the most job postings in GO Virginia Region 3. The most job posts were for registered nurses, with 1,361 job openings in 2025 Q1. Including registered nurses, nine of the top 20 occupations were in healthcare practitioners and technical occupations and healthcare support occupations. Two other occupations related to health care and social assistance are in the top 20: medical and health service managers and social and human service assistants. Unsurprisingly, the second and third occupations with the most job postings are highly represented in the retail trade sector: retail salespersons and first-line supervisors of retail sales workers.

Table 4.2: Job Openings by Top 20 Occupations in GO Virginia Region 3, 2025 Q1

| Occupation | Job Openings |
|--|--------------|
| Registered Nurses | 1,361 |
| Retail Salespersons | 622 |
| First-Line Supervisors of Retail Sales Workers | 548 |
| Physical Therapists | 373 |
| Medical and Health Services Managers | 357 |
| Social and Human Service Assistants | 356 |
| Heavy and Tractor-Trailer Truck Drivers | 355 |
| Fast Food and Counter Workers | 351 |
| Speech-Language Pathologists | 351 |
| First-Line Supervisors of Food Preparation and Serving Workers | 346 |
| Maintenance and Repair Workers, General | 290 |
| Licensed Practical and Licensed Vocational Nurses | 265 |
| Stockers and Order Fillers | 250 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 229 |
| Merchandise Displayers and Window Trimmers | 219 |
| Critical Care Nurses | 189 |
| Nursing Assistants | 187 |
| Radiologic Technologists and Technicians | 163 |
| Occupational Therapy Assistants | 162 |
| Physical Therapist Assistants | 146 |

Source: Chumra & Jobs EQ

4.1.3. Job Availability by Major Employers

Most of the top 10 employers with the most job openings in the GO Virginia 3 Region are in the health care and social assistance sector and the retail trade sector. As Table 4.3 shows, in 2025 Q1, there were 305 open positions at LifePoint Health and 200 open positions at Centra Health, both major healthcare providers in the region. These are followed by Walmart (165), a major retailer. The other retailers in the top 10 are Dollar General (121), AutoZone (120), CVS (101), and Food Lion (98). The list also includes Caesars Entertainment (158), a casino operator in the arts, entertainment, and recreation sector that operates the Caesars Virginia Casino in Danville. Henry County Public Schools (110), in the educational services sector, is also in the top ten. One organization in the accommodation and food services sector is in the top ten. Carrols Corporation, a major franchisee for Burger King, had 94 job openings.

Table 4.3: Job Openings by Top 10 Employers in GO Virginia Region 3, 2025 Q1

| Company | Job Openings |
|-----------------------------|--------------|
| LifePoint Health | 305 |
| Centra Health | 200 |
| Walmart | 165 |
| Caesars Entertainment | 158 |
| Dollar General | 121 |
| AutoZone | 120 |
| Henry County Public Schools | 110 |
| CVS | 101 |
| Food Lion | 98 |
| Carrols Corporation | 94 |

Source: Chmura & JobsEQ

4.2. Job Availability by Pay Range and Living Wages

4.2.1. Job Availability by Pay Range

IALR desires to know the job availability by different pay ranges, from the state minimum wage of \$12.41 per hour (corresponding to an annual wage of \$25,813 if a person works full-time) to jobs paying over \$40 per hour (\$83,200 annual wage). Chmura used JobsEQ Real Time Intelligence job posting wages to set openings into eight pay brackets.

Table 4.4 presents the job openings by pay range. The pay range with the most openings (3,167) is \$15.00-\$17.99 per hour. This range accounts for 20.6% of total job openings. Retail salespersons, first-line supervisors of retail sales workers, and first-line supervisors of food preparation workers dominate this pay range.

Jobs that pay between \$30.00 and \$39.99 per hour make up 19.4% of job postings with wages. Registered nurses account for 41.3% of job openings in this pay range, with 1,233 registered nurse job postings in this range (90.6% of registered nurse job postings).

Table 4.4: Job Openings by Pay Range in GO Virginia Region 3, 2025 Q1

| Wage Range | 2025 Q1 | Job Openings | Wage Range Distribution (%) |
|-------------------|---------|--------------|-----------------------------|
| | | (%) | |
| \$12.41 - \$12.99 | 335 | | 2.2% |
| \$13.00 - \$14.99 | 1,115 | | 7.2% |
| \$15.00 - \$17.99 | 3,167 | | 20.6% |
| \$18.00 - \$19.99 | 1,374 | | 8.9% |
| \$20.00 - \$24.99 | 1,980 | | 12.9% |
| \$25.00 - \$29.99 | 1,951 | | 12.7% |
| \$30.00 - \$39.99 | 2,985 | | 19.4% |
| \$40.00 and up | 2118 | | 13.8% |

Source: Chmura & JobsEQ

Table 4.5 lists the job openings in the GO Virginia 3 Region by industry and pay range to illustrate the types of jobs available in various industry sectors. For the health care and social assistance sector, which has the most job openings and generally pays a higher-than-average wage, 39.1% of job openings are in \$30.00-\$39.99 pay range due to the high incidence of registered nurse job postings in this range. Both the retail trade sector and the accommodation and food services sector, which are the second and third largest sectors by job openings, respectively, are highly represented in the \$15.00-\$17.99 pay range. For the retail trade sector, 39.3% of job openings are in this range, and for the accommodation and food services sector, 37.7% are in this range.

Table 4.5: Job Openings by Pay Range and Industry in GO Virginia Region 3, 2025 Q1

| | \$12.41 - \$12.99 | \$13.00 - \$14.99 | \$15.00 - \$17.99 | \$18.00 - \$19.99 | \$20.00 - \$24.99 | \$25.00 - \$29.99 | \$30.00 - \$39.99 | \$40.00 and up |
|---|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|-------------------|
| Agriculture, Forestry, Fishing and Hunting | 0 | 1 | 6 | 1 | 2 | 2 | 0 | 0 |
| Mining, Quarrying, and Oil and Gas Extraction | 0 | 0 | 3 | 0 | 5 | 2 | 0 | 0 |
| Utilities | 0 | 0 | 5 | 4 | 6 | 3 | 5 | 4 |
| Construction | 3 | 29 | 181 | 127 | 307 | 176 | 125 | 122 |
| Manufacturing | 8 | 76 | 189 | 136 | 203 | 122 | 78 | 92 |
| Wholesale Trade | 1 | 8 | 51 | 25 | 47 | 24 | 24 | 16 |
| Retail Trade | 78 | 270 | 752 | 324 | 125 | 57 | 47 | 88 |
| Transportation and Warehousing | 2 | 23 | 138 | 31 | 86 | 197 | 49 | 19 |
| Information | 1 | 2 | 8 | 8 | 18 | 11 | 20 | 41 |
| Finance and Insurance | 1 | 15 | 55 | 36 | 39 | 72 | 64 | 62 |
| Real Estate and Rental and Leasing | 0 | 4 | 19 | 15 | 23 | 17 | 7 | 8 |
| Professional, Scientific, and Technical Services | 99 | 40 | 151 | 41 | 86 | 73 | 77 | 103 |
| Management of Companies and Enterprises | 3 | 5 | 2 | 0 | 0 | 0 | 0 | 0 |
| Administrative Support and Waste Management | 9 | 63 | 168 | 76 | 153 | 257 | 69 | 85 |
| Educational Services | 20 | 49 | 243 | 95 | 158 | 287 | 186 | 80 |
| Health Care and Social Assistance | 12 | 131 | 562 | 270 | 497 | 524 | 2,157 | 1,326 |
| Arts, Entertainment, and Recreation | 11 | 41 | 39 | 10 | 13 | 10 | 10 | 12 |
| Accommodation and Food Services | 68 | 336 | 468 | 102 | 93 | 56 | 31 | 32 |
| Other Services (except Public Administration) | 12 | 7 | 56 | 32 | 40 | 9 | 10 | 6 |
| Public Administration | 7 | 15 | 71 | 41 | 79 | 52 | 26 | 22 |
| Total | 335 | 1,115 | 3,167 | 1,374 | 1,980 | 1,951 | 2,985 | 2,118 |

Source: Chmura & JobsEQ

4.2.2. Availability of Living-Wage Jobs

One research question is to understand the availability of living wage jobs in the GO Virginia 3 region. Living-wage jobs are defined as open positions that pay wages higher than living wages. The answer to this question depends on the family type. One job may provide a living wage for a single adult, but would not be sufficient to support a working family.

Table 4.6 presents data indicating the availability of living wage jobs. Since adults without children tend to have lower living expenses, 100% of available jobs in the region can support 1-adult families and 2-working-adult families, and 99% of available jobs can support families with 2 working adults and 1 child. However, as the number of adults or children increases, so do the wages necessary to support those family members. For example, only 30% of available jobs can support this family with one adult and three children. A family of two adults (one working) and three children can be supported by only 38% of available jobs. If both adults are working, 64% of available jobs can support families with three children.

As Chmura's analysis shows, a majority of the job openings pay living wages. Families with children, however, will have a more difficult time meeting their basic needs, which include child care and transportation. If affordable child care can be found, or employers can support child care, then more jobs can be living wage jobs for those families.

Table 4.6: Availability of Living Wage Jobs in GO Virginia Region 3, 2025 Q1

| Family Type | % of Job Openings over Living Wage |
|---------------------------------|------------------------------------|
| 1 Adult | 100% |
| 1 Adult 1 Child | 65% |
| 1 Adult 2 Children | 47% |
| 1 Adult 3 Children | 30% |
| 2 Adults (1 working) | 72% |
| 2 Adults (1 working) 1 Child | 59% |
| 2 Adults (1 working) 2 Children | 51% |
| 2 Adults (1 working) 3 Children | 38% |
| 2 Adults | 100% |
| 2 Adults 1 Child | 99% |
| 2 Adults 2 Children | 87% |
| 2 Adults 3 Children | 64% |

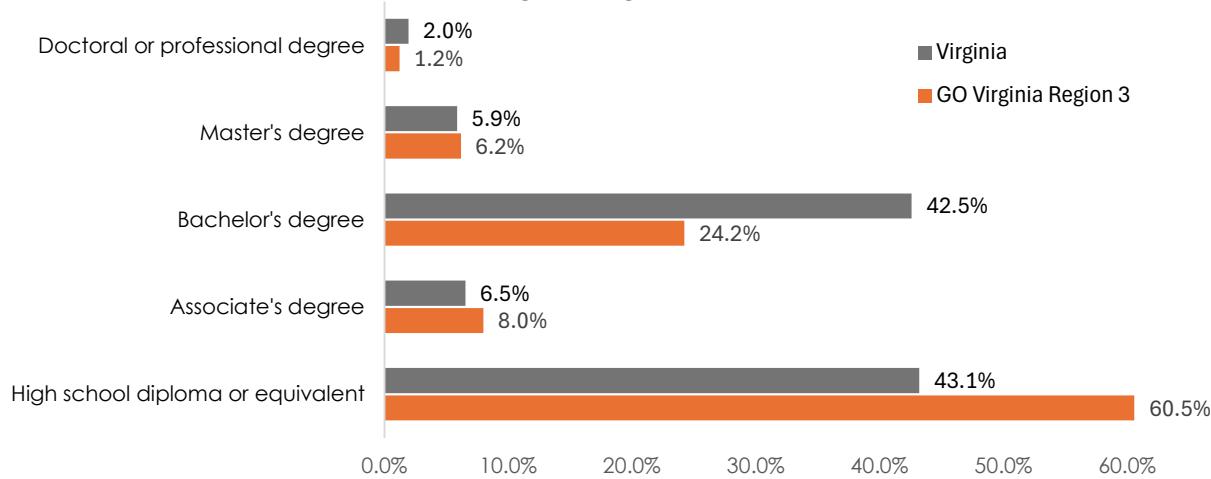
Source: Chmura Economics and Analytics

As Chmura's analysis shows, a majority of the job openings pay living wages. Families with children, however, will have a more difficult time meeting their basic needs, which include child care and transportation. If affordable child care can be found, or employers can support child care, then more jobs can be living wage jobs for those families.

4.3. Job Availability by Education Requirement

Figure 6.1 presents job openings by education requirement in the GO Virginia 3 Region. More than half (60.5%) of job openings only require a high school diploma or equivalent. As a comparison, 24.2% of job openings in the GO Virginia 3 Region need a bachelor's degree, compared with 42.5% for the state average. The key conclusion is that job openings in the GO Virginia 3 Region tend to be concentrated in low-skilled jobs that do not require college or higher degrees.

Figure 4.1: Job Openings by Education Attainment in GO Virginia Region 3, 2025Q1



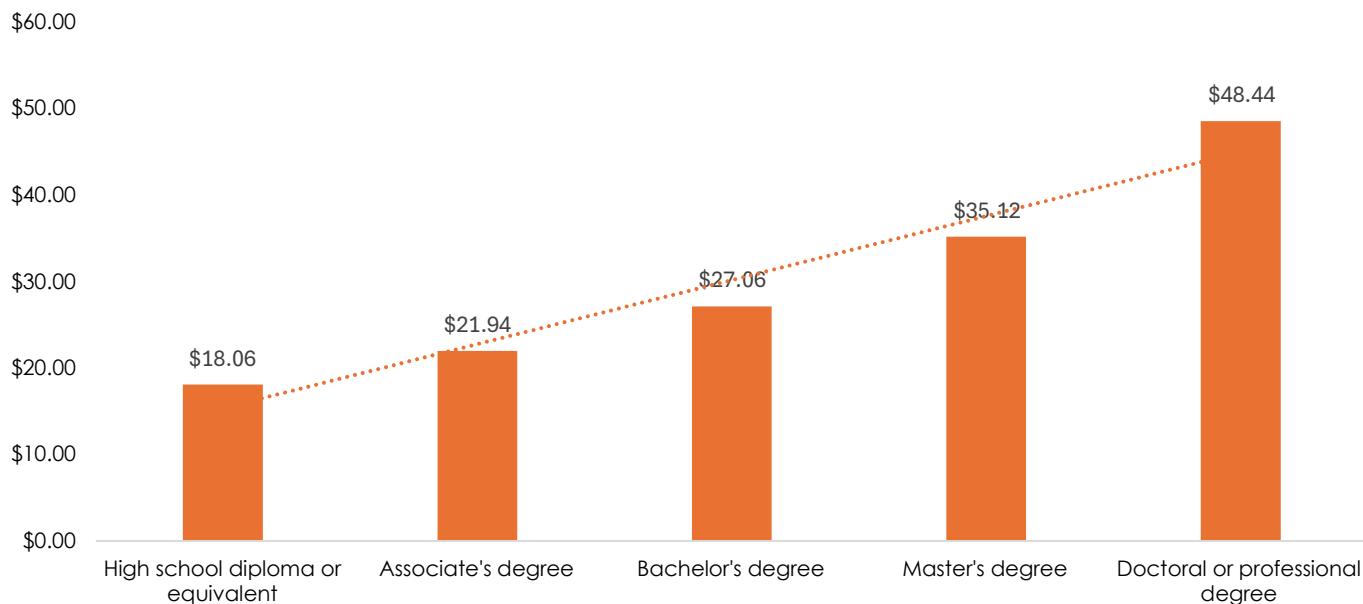
Source: Chmura and JobsEQ

4.4. Correlation Between Education and Wages

It is not surprising that there is a strong positive correlation between education level and wages in the GO Virginia 3 Region. The higher wages are necessary to compensate for the additional investment people spend to acquire additional education. It also reflects the additional value or productivity an individual with a high education level has in the labor market.

Figure 6.2 demonstrates the positive correlation between level of education and wages. As the level of education rises, so does the average hourly wage for jobs requiring that education. For example, the median hourly wage for job openings that only require a high school diploma or equivalent is \$18.06 per hour. For college-level education, the median hourly wage for job openings requiring an associate degree is \$21.94 per hour, while it is \$27.06 per hour for jobs with a bachelor's degree. Based on the wage and education data in the Dan River Region, a statistical analysis indicates that each year of additional education can increase hourly wages by \$3.70 per hour.²⁸

Figure 4.2: Hourly Wages by Education in GO Virginia Region 3



Source: Chmura and JobsEQ

4.5. Jobs Availability in the Controlled Environment Agriculture Industry

There is only one controlled environment agriculture company with job postings in the GO Virginia 3 Region: AeroFarms, which opened a vertical farming facility in Danville in 2022 and has since moved its headquarters to the city. There were 48 active positions at AeroFarms in 2025 Q1.

Table 4.7: Job Openings by Job Title in the Controlled Environment Agriculture Industry in GO Virginia Region 3

| Occupation | Job Openings |
|---|--------------|
| HACCP & Quality Assurance Coordinator | 5 |
| Food Safety & Quality Assurance (FSQA) Technician | 4 |
| HVAC Technician | 3 |
| Maintenance Controls Engineer | 3 |
| Assistant Grower | 2 |

²⁸ The currently available data do not enable Chmura to evaluate the effect of certifications or licenses on wages.

| | |
|--|---|
| Facility Security & Safety Officer | 2 |
| Forklift Operator | 2 |
| Grow Room Technician | 2 |
| Multi-Craft Maintenance Technician | 2 |
| Operations | 2 |
| Operations Manager | 2 |
| Production Supervisor | 2 |
| Senior Project Manager | 2 |
| Controls Technician | 1 |
| Executive Assistant | 1 |
| Facilities Technician | 1 |
| General Employment Application | 1 |
| Nutrient Prep Technician | 1 |
| Packaging Technician | 1 |
| Plant Controller | 1 |
| Production Supervisor - Night Shift | 1 |
| Production Team Lead | 1 |
| Robotic Cell / Combiner Technician | 1 |
| Senior Controls Engineer - SCADA Systems (Ignition, CODESYS) | 1 |
| SME-Process Technician - Sanitation Tunnel | 1 |
| Team Lead | 1 |
| Tower CIP Tech | 1 |
| Warehouse Technician | 1 |

Source: Chmura & JobsEQ

Table 4.8 shows job openings by wage range in the controlled environment agriculture industry in the GO Virginia 3 Region in 2025 Q1. Jobs in this industry have a higher wage floor than the region overall with wages starting int the \$15.00-\$17.99. The wage range with the most job openings is also higher than the region overall. The \$20.00 - \$24.99 wage range has the most job openings and accounts for 29.2% of all job openings in the industry. The industry, however, has a lower proportion of job openings at the highest wage ranges, with 16.7% of job openings in the \$30.00-\$39.99 wage range and 10.4% in the \$40.00 and up range (compared to 19.4% and 13.8% for the overall region, respectively).

Table 4.8: Job openings by Wage Range in the Controlled Environment Agriculture Industry in the GO Virginia 3 Region, 2025 Q1²⁹

| Wage Range | Job Openings | Distribution of Wage Range (%) |
|-------------------|--------------|--------------------------------|
| \$15.00 - \$17.99 | 7 | 14.6% |
| \$18.00 - \$19.99 | 6 | 12.5% |
| \$20.00 - \$24.99 | 14 | 29.2% |
| \$25.00 - \$29.99 | 8 | 16.7% |
| \$30.00 - \$39.99 | 8 | 16.7% |
| \$40.00 and up | 5 | 10.4% |

Source: Chmura & JobsEQ

wage ranges, with 16.7% of job openings in the \$30.00-\$39.99 wage range and 10.4% in the \$40.00 and up range (compared to 19.4% and 13.8% for the overall region, respectively).

²⁹ Wage information was available for only 25% of the sample. The remaining portion was imputed based on occupation, education and experience requirement, and regional factors.

Living wage jobs availability for the controlled environment agriculture industry in GO Virginia Region 3 is better than the region overall for six of the 12 family types. These include families with one adult and one child, two adults (one working) with less than two children, and two adults (both working) with one or more children. Families with one adult with one child and families with one adult with three children (44% and 27% respectively) were roughly aligned with the region overall (44% and 30% respectively) as were families with two adults (one working) with two children and two adults (one working) with three children (44% and 35% in the industry versus 51% and 38% in the region overall).

Table 4.9: Availability of Living Wage Jobs in GO Virginia Region 3, Controlled Environment Agriculture, 2025 Q1

| Family Type | % of Job Openings over Living Wage |
|---------------------------------|------------------------------------|
| 1 Adult | 100% |
| 1 Adult 1 Child | 77% |
| 1 Adult 2 Children | 44% |
| 1 Adult 3 Children | 27% |
| 2 Adults (1 working) | 92% |
| 2 Adults (1 working) 1 Child | 60% |
| 2 Adults (1 working) 2 Children | 44% |
| 2 Adults (1 working) 3 Children | 35% |
| 2 Adults | 100% |
| 2 Adults 1 Child | 100% |
| 2 Adults 2 Children | 98% |
| 2 Adults 3 Children | 75% |

Source: Chmura Economics and Analytics

4.6. Jobs Availability in the Advanced Manufacturing Industry

Manufacturing is the fifth largest sector by job openings in the GO Virginia 3 Region, with 910 openings in 2025 Q1, and remains a targeted industry in the region as announcements of advanced manufacturing employers expanding in Southern Virginia continue. Table 4.10 shows the top 25 occupations in the GO Virginia 3 Region manufacturing sector by job postings. Other production workers and general maintenance and repair workers had the most openings in 2025 Q1 with 71 job posts each. These were followed by laborers and freight, stock, and material movers (52), first-line supervisors of production and operating workers (46), and merchandise displayers and window trimmers (41).

Table 4.10: Job Openings by Occupation in the Manufacturing Sector in GO Virginia Region 3, 2025 Q1

| Occupational Health and Safety Specialists | Job Openings |
|--|--------------|
| Maintenance and Repair Workers, General | 71 |
| Production Workers, All Other | 71 |
| Laborers and Freight, Stock, and Material Movers, Hand | 52 |
| First-Line Supervisors of Production and Operating Workers | 46 |
| Merchandise Displayers and Window Trimmers | 41 |
| Stockers and Order Fillers | 36 |
| Human Resources Specialists | 23 |
| Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel | 18 |
| Shipping, Receiving, and Inventory Clerks | 18 |
| Quality Control Analysts | 17 |
| Electrical Engineers | 16 |
| Industrial Truck and Tractor Operators | 16 |
| Architectural and Engineering Managers | 14 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 14 |
| Inspectors, Testers, Sorters, Samplers, and Weighers | 13 |
| Retail Salespersons | 13 |

| | |
|---|----|
| Heavy and Tractor-Trailer Truck Drivers | 12 |
| Occupational Health and Safety Specialists | 12 |
| Business Operations Specialists, All Other | 11 |
| First-Line Supervisors of Mechanics, Installers, and Repairers | 11 |
| Secretaries and Administrative Assistants, Except Legal, Medical, and Executive | 11 |
| First-Line Supervisors of Office and Administrative Support Workers | 10 |
| Computer User Support Specialists | 9 |
| First-Line Supervisors of Retail Sales Workers | 9 |
| Industrial Engineers | 9 |

Source: Chmura & JobsEQ

Table 4.11 shows manufacturing job openings by wage range in GO Virginia Region 3. Compared to the region overall, the manufacturing sector is more concentrated at the middle wage ranges, with the highest concentration in the \$20.00 - \$24.99 wage range (22.5%). This was followed by the \$15.00 - \$17.99 wage range (20.9%), the \$18.00 - \$19.99 wage range (15.0%), and the \$25.00-\$29.00 wage range (13.5%). The manufacturing sector was less concentrated at the lower end with only 0.9% of job openings in the \$12.41 - \$12.99 range (2.20% in the region overall), and it was less concentrated at the higher-end with 8.6% in the \$30.00 - \$39.99 range (19.4% in the region overall) and 10.2% in the \$40.00 and up range (13.80% in the region overall).

Since the manufacturing sector jobs tend to be more concentrated in the middle of the wage distribution compared to the entire regional jobs, the percentage of the available jobs that pay above living wage in the sector is qualitatively similar to the percentage for the entire region for families with two adults, both working, since they have lower hourly rate thresholds. The decrease in opportunity in the upper hand of the wage distribution in the manufacturing sector presents a challenge for households with one adult or two adults but only one working, and with more than one child.

Table 4.11: Job Openings by Pay Range in GO Virginia Region 3, 2025 Q1

| Wage Range | Job Openings 2025 Q1 | Job Openings | Wage Range Distribution (%) |
|-------------------|-------------------------|--------------|-----------------------------|
| | | (%) | |
| \$12.41 - \$12.99 | 8 | | 0.9% |
| \$13.00 - \$14.99 | 76 | | 8.4% |
| \$15.00 - \$17.99 | 189 | | 20.9% |
| \$18.00 - \$19.99 | 136 | | 15.0% |
| \$20.00 - \$24.99 | 203 | | 22.5% |
| \$25.00 - \$29.99 | 122 | | 13.5% |
| \$30.00 - \$39.99 | 78 | | 8.6% |
| \$40.00 and up | 92 | | 10.2% |

Source: Chmura & JobsEQ

Table 4.12: Availability of Living Wage Jobs in GO Virginia Region 3, Advanced Manufacturing, 2025 Q1

| Family Type | % of Job Openings over Living Wage |
|---------------------------------|------------------------------------|
| 1 Adult | 100% |
| 1 Adult 1 Child | 62% |
| 1 Adult 2 Children | 32% |
| 1 Adult 3 Children | 16% |
| 2 Adults (1 working) | 74% |
| 2 Adults (1 working) 1 Child | 52% |
| 2 Adults (1 working) 2 Children | 38% |
| 2 Adults (1 working) 3 Children | 23% |
| 2 Adults | 100% |
| 2 Adults 1 Child | 99% |
| 2 Adults 2 Children | 89% |
| 2 Adults 3 Children | 60% |

Source: Chmura Economics and Analytics

5. Analysis of Job Availability in the GO Virginia 3 Region in June 2017 and June 2025

In this section, Chmura estimates the quantity and quality of available jobs in the GO Virginia 3 Region in June 2025 and relates it to estimates from June 2017 in order to compare current living wage jobs availability with a previous living wage jobs availability study completed in 2017.

5.1. Job Availability by Industry Sector & Employers

5.1.1. Job Availability by Industry Sector

Figure 5.1 compares availability based on Real Time Intelligence job posting data for the GO Virginia 3 region between June 2017 and June 2025. The highest proportion of jobs available in the region in June 2025 was in the health care and social assistance sector, with 35.3% of posts. Six hundred eighty-four of the 2,768 jobs in the sector were for registered nurses. Other occupations in the health care and social assistance sector with large numbers of job postings were physical therapists (186), medical and health services managers (167), and licensed practical and licensed vocational nurses (144).

Table 5.1: GO Virginia Region 3 Job Openings by Industry Sector

| Sector | June 2025 | | June 2017 | |
|--|--------------|---------------|--------------|---------------|
| | Volume | (%) | Volume | (%) |
| Accommodation and Food Services | 857 | 10.9% | 722 | 12.5% |
| Administrative Support and Waste Management | 278 | 3.5% | 387 | 6.7% |
| Agriculture, Forestry, Fishing and Hunting | 4 | 0.1% | 5 | 0.1% |
| Arts, Entertainment, and Recreation | 72 | 0.9% | 25 | 0.4% |
| Construction | 464 | 5.9% | 116 | 2.0% |
| Educational Services | 663 | 8.5% | 307 | 5.3% |
| Finance and Insurance | 113 | 1.4% | 171 | 3.0% |
| Health Care and Social Assistance | 2,768 | 35.3% | 1,043 | 18.0% |
| Information | 51 | 0.7% | 115 | 2.0% |
| Management of Companies and Enterprises | 5 | 0.1% | 2 | 0.0% |
| Manufacturing | 401 | 5.1% | 247 | 4.3% |
| Mining, Quarrying, and Oil and Gas Extraction | 13 | 0.2% | 1 | 0.0% |
| Other Services | 74 | 0.9% | 135 | 2.3% |
| Professional, Scientific, and Technical Services | 347 | 4.4% | 210 | 3.6% |
| Public Administration | 113 | 1.4% | 285 | 4.9% |
| Real Estate and Rental and Leasing | 52 | 0.7% | 72 | 1.2% |
| Retail Trade | 1,239 | 15.8% | 1,703 | 29.5% |
| Transportation and Warehousing | 247 | 3.1% | 158 | 2.7% |
| Utilities | 27 | 0.3% | 7 | 0.1% |
| Wholesale Trade | 55 | 0.7% | 68 | 1.2% |
| Total | 7,843 | 100.0% | 5,779 | 100.0% |

Source: Chmura Economics & Analytics

Almost 16% of open positions were available in the retail trade sector, with 1,239 open positions. Four hundred and fourteen of the open positions were available for retail salesperson, and 266 were available for first-line supervisors of retail sales workers.

About 11% of open positions were available in the accommodation and food services sector, which includes lodging, fast-food restaurants, and full-service restaurants. Two hundred and fourteen of the 857 available jobs in this sector are for fast food and counter workers, and 231 open positions are for first-line supervisors of food preparation workers. These two occupations make up over half of the June 2025 job postings in the sector.

In contrast to June 2025, the largest sector by job openings in Go Virginia Region 3 in June 2017 was the retail trade sector, accounting for 29.5% of the 5,779 open positions,. This was followed by health care and social assistance with 1,043 job openings (18.0%) and 722 openings in accommodation and food services (12.5%). This marks a shift from occupations in lower-wage, higher-turnover sectors such as retail trade in 2017, to higher-wage more stable sectors such as health care in 2025, a trend we have seen nationwide.

5.1.2. Job Availability by Occupation

Table 5.2 displays the top 20 occupations with the most job postings in GO Virginia 3 in June 2025, which shows similar trend to the top 20 occupations in 2025 Q1. The most job posts were for registered nurses, with 700 job openings in June 2025. Including registered nurses, seven of the top 20 occupations were in healthcare related occupation groups (healthcare practitioners and technical occupations, and healthcare support occupations). Two other occupations related to health care and social assistance were in the top 20: medical and health service managers and social and human service assistants. Unsurprisingly, the second and third occupations with the most job postings are highly represented in the retail trade sector: retail salespersons and first-line supervisors of retail sales workers; and the fourth and fifth occupations with the most job postings were in the accommodation and food services sector: first-line supervisors of food preparation and serving workers and fast food and counter workers.

Table 5.2: Job Openings by Top 20 Occupations in GO Virginia Region 3, June 2025

| Occupation | Job Openings |
|--|--------------|
| Registered Nurses | 700 |
| Retail Salespersons | 472 |
| First-Line Supervisors of Retail Sales Workers | 302 |
| First-Line Supervisors of Food Preparation and Serving Workers | 263 |
| Fast Food and Counter Workers | 245 |
| Medical and Health Services Managers | 243 |
| Physical Therapists | 186 |
| Social and Human Service Assistants | 157 |
| Heavy and Tractor-Trailer Truck Drivers | 154 |
| Licensed Practical and Licensed Vocational Nurses | 149 |
| Speech-Language Pathologists | 146 |
| Maintenance and Repair Workers, General | 137 |
| Stockers and Order Fillers | 134 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 103 |
| Nursing Assistants | 97 |
| Occupational Therapy Assistants | 95 |
| Merchandise Displayers and Window Trimmers | 88 |
| Personal Care Aides | 71 |
| Production Workers, All Other | 66 |
| Parts Salespersons | 65 |

Source: Chumra & Jobs EQ

In June 2017, healthcare-related occupations were less represented in the top 20 occupations by job posting, as shown in Table 5.3. Only three of the top 20 occupations were in the healthcare occupation group (registered nurses, physical therapists, and nursing assistants), and two others are related to healthcare (social and human service assistants and medical and health services managers). The occupation with the most job openings in June 2017 was retail salespersons with 758 posts, followed by first-line supervisors of retail sales workers, first-line supervisors of food preparation and serving workers, and fast food and counter workers. The shift from retail workers and fast-food workers in 2017 to healthcare workers in 2025 marks a shift away from lower-pay, higher turnover jobs availability to higher-pay more stable positions in the region.

Table 5.3: Job Openings by Top 20 Occupations in GO Virginia Region 3, June 2017

| Occupation | Job Openings |
|---|--------------|
| Retail Salespersons | 758 |
| First-Line Supervisors of Retail Sales Workers | 441 |
| First-Line Supervisors of Food Preparation and Serving Workers | 269 |
| Fast Food and Counter Workers | 208 |
| Registered Nurses | 151 |
| Stockers and Order Fillers | 126 |
| Customer Service Representatives | 125 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 115 |
| Social and Human Service Assistants | 112 |
| Heavy and Tractor-Trailer Truck Drivers | 111 |
| Food Preparation Workers | 105 |
| Cashiers | 99 |
| Medical and Health Services Managers | 89 |
| Food Service Managers | 71 |
| Physical Therapists | 63 |
| Securities, Commodities, and Financial Services Sales Agents | 61 |
| Maintenance and Repair Workers, General | 58 |
| Nannies | 56 |
| Nursing Assistants | 56 |
| Secretaries and Administrative Assistants, Except Legal, Medical, and Executive | 54 |

Source: Chumra & Jobs EQ

5.1.3. Job Availability by Major Employers

The healthcare sector held the largest number of the top 10 employers with the most job openings in the GO Virginia 3 Region. As Table 5.4 shows, in June 2025, there were 198 open positions at LifePoint Health, which was the largest employer by job postings, 104 open positions at Centra Health, which was the fourth largest, and 65 positions open at SOVAH Health, which was tenth largest. The second, third, sixth, and ninth largest employers were all in the retail trade sector: Food Lion (174), Walmart (132), Dollar General (83), and CVS (74). The fifth largest was Carrols Corporation (97), a major franchisee for Burger King. The list also includes Henry County Public Schools (110) and Caesars Entertainment (74), a casino operator in the arts, entertainment, and recreation sector that operates the Caesars Virginia Casino in Danville.

Table 5.4: Job Openings by Top 10 Employers in GO Virginia Region 3, June 2025

| Company | Job Openings |
|-----------------------------|--------------|
| LifePoint Health | 198 |
| Food Lion | 174 |
| Walmart | 132 |
| Centra Health | 104 |
| Carrols Corporation | 97 |
| Dollar General | 83 |
| Henry County Public Schools | 77 |
| Caesars Entertainment | 74 |
| CVS | 74 |
| SOVAH Health | 65 |

Source: Chmura & JobsEQ

In June 2017, as shown in Table 5.5, Food Lion had by far the largest number of job openings in the GO Virginia 3 region with 627 open positions. Including Food Lion, there were four companies in the retail trade sector among the top ten largest employers by job postings: Dollar General (216), Family Dollar (94), and CVS (77). Two employers were in the healthcare sector: Sentara Healthcare (157) and Danville Regional Medical Center (83). Two employers, McDonald's (95) and Taco Bell (69), were in the accommodation and food services sector. The City of Danville, which belongs to the public administration sector, was also in the top ten with 98 open positions.

Table 5.5: Job Openings by Top 10 Employers in GO Virginia Region 3, June 2017

| Company | Job Openings |
|----------------------------------|--------------|
| Food Lion | 627 |
| Dollar General | 216 |
| Sentara Healthcare | 157 |
| Commonwealth of Virginia | 102 |
| City of Danville | 98 |
| McDonald's | 95 |
| Family Dollar | 94 |
| Danville Regional Medical Center | 83 |
| CVS | 77 |
| Taco Bell | 69 |

Source: Chmura & JobsEQ

5.2. Job Availability by Pay Range and Living Wages

5.2.1. Job Availability by Pay Range

In 2025, the state minimum wage was \$12.41, so there are no jobs available below \$11/hour. In June 2025, the wage distribution from job openings is bimodal, meaning it has two distinct concentration points. First is the \$15.00 to \$17.99 wage range, with 23.5% of open positions. This wage range was most heavily skewed towards workers in the retail sector and food services sector, with 291 openings in this range for retail sales persons, 103 for first-line supervisors of retail sales workers, and 138 for first-line supervisors of food preparation and serving workers. The second is the \$30.00 to \$39.00 wage range, which accounted for 19% of job openings in June 2025. Registered nurses accounted for 71% of the job openings in the \$30.00 to \$39.00 wage range.

In June 2017, wages were less prevalent in job postings, so Chmura used the regional entry-level wages³⁰ from the BLS Occupational Wages and Statistics program to estimate the wage associated with open positions. Chmura chose to use entry-level wages rather than average or median wages, because workers typically must accumulate experience and seniority before their income reaches the average wage level of the occupation. The entry-level wage for registered nurses was \$26.25 per hour in Virginia. All job openings for registered nurses will be assigned an hourly wage of \$26.25.

Wages in June 2017 were more heavily skewed towards the lower ranges, with more than 50% of jobs paying less than \$13/hour. A second concentration point is the \$15.00 to \$17.99 range, with 49% of the posts in this range for first-line supervisors of retail sales workers. The shift in the wage distribution between 2017 and 2025 was the result of a lower minimum wage in 2017 (\$7.25/hour), post-COVID wage inflation, and a recent shift in the composition of labor demand away from low-paying jobs in retail and hospitality.

Table 5.6: Job Openings by Pay Range in GO Virginia Region 3

| Wage Range | June 2025 | | June 2017 | |
|-------------------|-----------|-------|-----------|-------|
| | Volume | (%) | Volume | (%) |
| \$7.25 - \$8.99 | na | na | 705 | 12.2% |
| \$9.00 - \$10.99 | na | na | 1,373 | 23.8% |
| \$11.00 - \$12.99 | 206 | 2.7% | 859 | 14.9% |
| \$13.00 - \$14.99 | 564 | 7.3% | 305 | 5.3% |
| \$15.00 - \$17.99 | 1,810 | 23.5% | 898 | 15.5% |
| \$18.00 - \$19.99 | 762 | 9.9% | 147 | 2.5% |
| \$20.00 - \$24.99 | 907 | 11.8% | 422 | 7.3% |
| \$25.00 - \$29.99 | 856 | 11.1% | 365 | 6.3% |
| \$30.00 - \$39.99 | 1,456 | 18.9% | 321 | 5.6% |
| \$40.00 and up | 1,125 | 14.6% | 384 | 6.6% |

Source: Chmura & JobsEQ

³⁰ Entry Level wages are defined by the hourly 25th percentile wage in Virginia.

Table 5.7 lists the job openings in June 2025 in the GO Virginia 3 Region by industry and pay range to illustrate the type of jobs available in various industry sectors. For the health care and social assistance sector, which has the most job openings and generally pays a higher-than-average wage, 39.1% of job openings are in \$30.00-\$39.99 pay range due to the high incidence of registered nurse job postings in this range. Both the retail trade sector and the accommodation and food services sector, which are the second and third largest sectors by job openings, respectively, are highly represented in the \$15.00-\$17.99 pay range. For the retail trade sector, 39.3% of job openings are in this range, and for the accommodation and food services sector, 37.7% are in this range.

Table 5.7: Job Openings by Pay Range and Industry in GO Virginia Region 3, June 2025

| | \$12.41 - \$12.99 | \$13.00 - \$14.99 | \$15.00 - \$17.99 | \$18.00 - \$19.99 | \$20.00 - \$24.99 | \$25.00 - \$29.99 | \$30.00 - \$39.99 | \$40.00 and up |
|---|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|----------------|
| Agriculture, Forestry, Fishing and Hunting | 0 | 0 | 3 | 0 | 0 | 0 | 1 | 0 |
| Mining, Quarrying, and Oil and Gas Extraction | 0 | 0 | 1 | 4 | 5 | 1 | 2 | 0 |
| Utilities | 0 | 0 | 3 | 1 | 11 | 4 | 5 | 3 |
| Construction | 0 | 7 | 47 | 52 | 120 | 94 | 61 | 83 |
| Manufacturing | 5 | 13 | 108 | 87 | 76 | 44 | 26 | 42 |
| Wholesale Trade | 0 | 4 | 10 | 6 | 19 | 4 | 8 | 4 |
| Retail Trade | 55 | 155 | 564 | 219 | 65 | 15 | 23 | 47 |
| Transportation and Warehousing | 1 | 7 | 67 | 17 | 39 | 95 | 13 | 6 |
| Information | 0 | 4 | 14 | 0 | 13 | 5 | 4 | 11 |
| Finance and Insurance | 0 | 3 | 12 | 9 | 11 | 37 | 16 | 25 |
| Real Estate and Rental and Leasing | 2 | 1 | 9 | 10 | 14 | 11 | 2 | 3 |
| Professional, Scientific, and Technical Services | 45 | 31 | 48 | 18 | 31 | 44 | 44 | 84 |
| Management of Companies and Enterprises | 0 | 0 | 4 | 1 | 0 | 0 | 0 | 0 |
| Administrative Support and Waste Management | 3 | 31 | 67 | 34 | 45 | 25 | 25 | 42 |
| Educational Services | 4 | 15 | 133 | 69 | 78 | 155 | 117 | 72 |
| Health Care and Social Assistance | 5 | 41 | 308 | 131 | 264 | 258 | 1,083 | 671 |
| Arts, Entertainment, and Recreation | 1 | 16 | 23 | 6 | 8 | 1 | 5 | 9 |
| Accommodation and Food Services | 76 | 225 | 347 | 73 | 55 | 41 | 10 | 10 |
| Other Services (except Public Administration) | 7 | 10 | 21 | 11 | 13 | 4 | 4 | 3 |
| Public Administration | 2 | 1 | 21 | 14 | 40 | 18 | 7 | 10 |
| Total | 206 | 564 | 1,810 | 762 | 907 | 856 | 1456 | 1,125 |

Source: Chmura & JobsEQ

Table 5.8 lists the job openings in June 2017 in the GO Virginia 3 Region by industry and pay range to illustrate the type of jobs available in various industry sectors. In the retail trade sector, which was the largest sector in the region in 2017, wages were generally on the lower end, with the highest incidence in the \$9.00 to \$10.99 range due to the high prevalence of retail salespersons. Healthcare and social assistance, which had the second most job openings in 2017, had a less variable spread among wage ranges, with 202 openings in the \$30.00 to \$39.99 which includes medical and health services managers, 193 openings in the \$25.00 to \$29.99 range which includes registered nurses, and 173 openings in the \$9.00 to \$10.99 range which includes nursing assistants.

Table 5.8: Job Openings by Pay Range and Industry in GO Virginia Region 3, June 2017

| | \$7.25 - \$8.99 | \$9.00 - \$10.99 | \$11.00 - \$12.99 | \$13.00 - \$14.99 | \$15.00 - \$17.99 | \$18.00 - \$19.99 | \$20.00 - \$24.99 | \$25.00 - \$29.99 | \$30.00 - \$39.99 | \$40.00 and up |
|---|--------------------|---------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|-------------------|
| Agriculture, For- estry, Fishing and Hunting | 12 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Mining, Quarry- ing, and Oil and Gas Extraction | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| Utilities | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 3 | 0 |
| Construction | 2 | 3 | 24 | 119 | 24 | 5 | 8 | 0 | 2 | 0 |
| Manufacturing | 0 | 11 | 24 | 4 | 9 | 34 | 5 | 0 | 15 | 16 |
| Wholesale Trade | 0 | 0 | 0 | 15 | 4 | 2 | 4 | 3 | 4 | 0 |
| Retail Trade | 257 | 983 | 69 | 4 | 451 | 0 | 0 | 0 | 0 | 34 |
| Transportation and Warehos- ing | 0 | 0 | 8 | 11 | 128 | 1 | 0 | 2 | 0 | 0 |
| Information | 0 | 0 | 0 | 5 | 0 | 0 | 32 | 0 | 24 | 3 |
| Finance and In- surance | 0 | 1 | 18 | 2 | 36 | 0 | 72 | 1 | 7 | 14 |
| Real Estate and Rental and Leas- ing | 0 | 31 | 0 | 1 | 3 | 0 | 0 | 0 | 31 | 0 |
| Professional, Scientific, and Technical Ser- vices | 0 | 3 | 61 | 15 | 4 | 22 | 44 | 59 | 10 | 41 |
| Management of Companies and Enterprises | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| Administrative Support and Waste Manage- ment | 18 | 59 | 170 | 17 | 28 | 14 | 57 | 13 | 8 | 17 |
| Educational Ser- vices | 0 | 6 | 24 | 1 | 4 | 1 | 11 | 69 | 0 | 0 |
| Health Care and Social Assis- tance | 135 | 173 | 163 | 70 | 136 | 58 | 71 | 193 | 202 | 91 |
| Arts, Entertain- ment, and Recre- ation | 0 | 7 | 5 | 0 | 0 | 0 | 2 | 10 | 0 | 1 |
| Accommodation and Food Ser- vices | 160 | 40 | 286 | 0 | 0 | 0 | 75 | 0 | 0 | 0 |
| Other Services (except Public Administration) | 121 | 4 | 2 | 34 | 33 | 0 | 0 | 0 | 0 | 6 |
| Public Admin- istration | 0 | 48 | 5 | 7 | 38 | 10 | 33 | 15 | 15 | 4 |
| Total | 705 | 1,373 | 859 | 305 | 898 | 147 | 422 | 365 | 321 | 245 |

Source: Chmura & JobsEQ

5.2.2. Availability of Living Wage Jobs

Living wage jobs availability in June 2025 showed a remarkable improvement since June 2017. The percentage of job openings offering wages over the living wage increased across the board, particularly with households with only one adult or only one adult working.

Table 5.9: % of Job Openings over Living Wage in GO Virginia Region 3

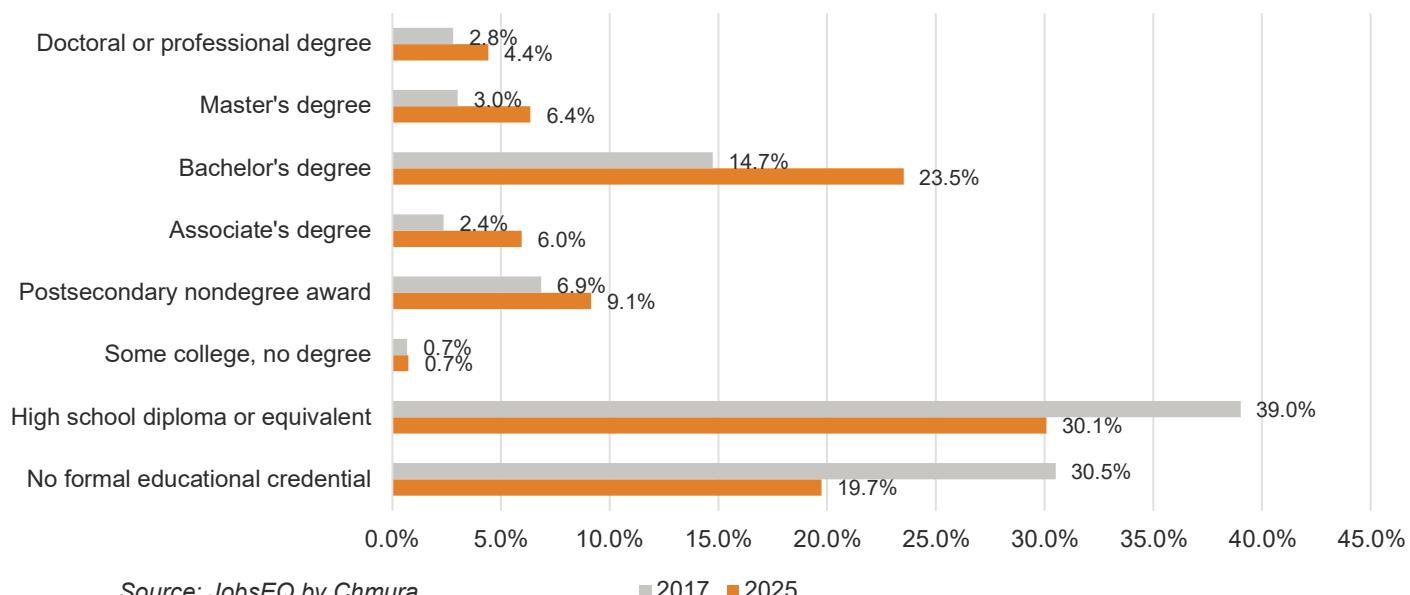
| Family Type | June 2025 | June 2017 |
|---------------------------------|-----------|-----------|
| 1 Adult | 100% | 92% |
| 1 Adult 1 Child | 62% | 42% |
| 1 Adult 2 Children | 45% | 25% |
| 1 Adult 3 Children | 30% | 17% |
| 2 Adults (1 working) | 69% | 49% |
| 2 Adults (1 working) 1 Child | 56% | 42% |
| 2 Adults (1 working) 2 Children | 48% | 29% |
| 2 Adults (1 working) 3 Children | 38% | 22% |
| 2 Adults | 100% | 100% |
| 2 Adults 1 Child | 99% | 71% |
| 2 Adults 2 Children | 87% | 60% |
| 2 Adults 3 Children | 61% | 45% |

Source: Chmura Economics and Analytics

5.3. Job Availability by Education Requirement

Figure 5.1 shows the proportion of job openings during June 2017 and June 2025 by minimum education requirements. In June 2017, job postings in the GO Virginia 3 region were less likely to have educational requirements listed in the job ad, so Chmura used minimum educational requirements data from the Bureau of Labor Statistics Occupational Employment Projections program to crosswalk posted occupations with educational requirements. The Bureau of Labor statistics data had a wider range of educational requirements, which included no formal educational credential, high school diploma or equivalent, postsecondary nondegree award, some college no degree, associate's degree, bachelor's degree, master's degree, and doctoral or professional degree. This process was repeated for June 2025 in order to facilitate cross-period comparisons.

Figure 5.1: Job Openings by Education Attainment in Go Virginia Region 3



Source: JobsEQ by Chmura

■ 2017 ■ 2025

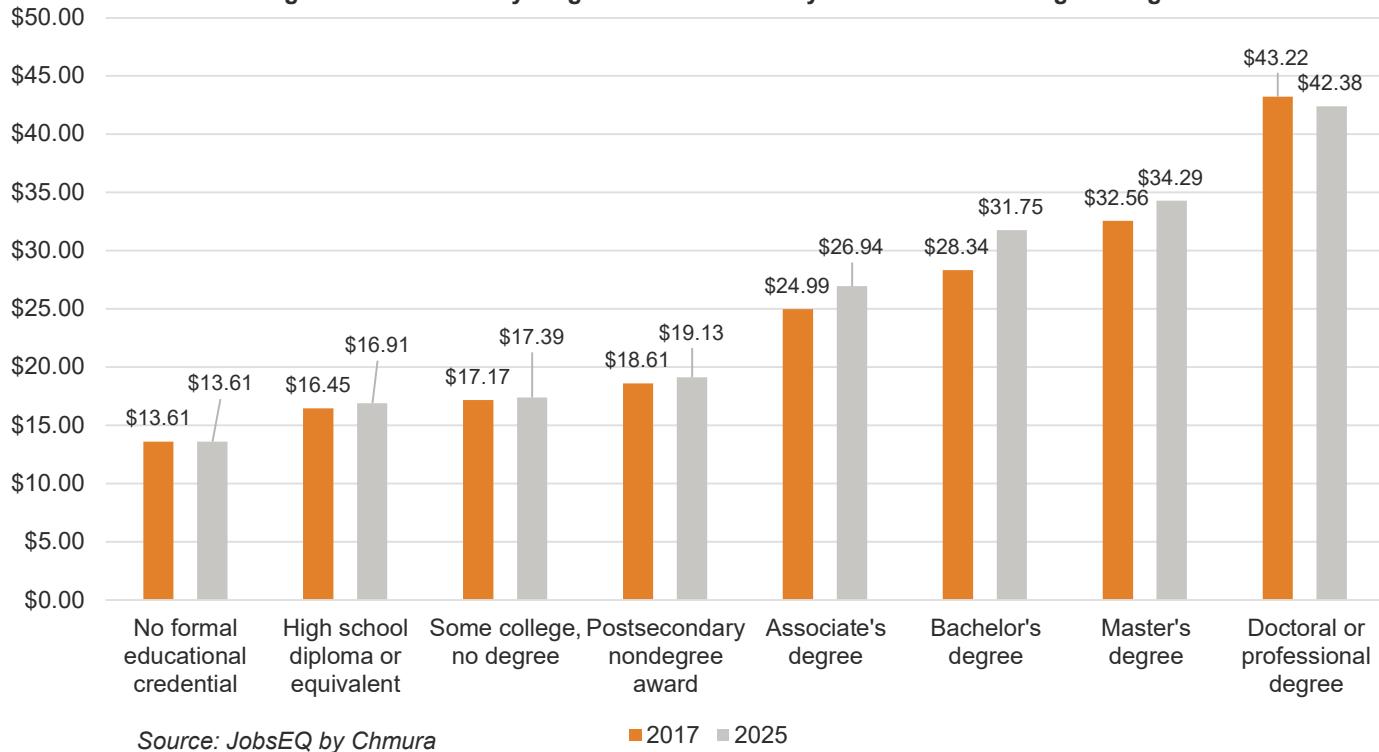
In 2017, job openings were heavily skewed towards the lower-educational range, with 69.5% requiring no formal education or a high school diploma or equivalent. 9.9% of openings required post-secondary education below a bachelor's degree (6.9% required a postsecondary nondegree award, 2.4% required an associate degree, and 0.7% required some college with no degree). 14.7% required a bachelor's degree, and 5.8% required a postgraduate degree. Being skewed towards the lower-skill, lower-wage jobs explains the lower availability of living wage jobs in the GO Virginia 3 region in 2017.

In June 2025, job postings were comparatively more skewed towards the higher-educational ranges. Although almost half of job postings (49.8%) required no formal education or a high school diploma or equivalent, 23.5% required a bachelor's degree in 2025, 8.8 percentage points higher than in 2017. Similarly 6.4% required a master's degree (compared to 3.0% in 2017) and 4.4% required a doctoral degree (compared to 2.8% in 2017). Positions requiring associate's degrees (6.1%) and postsecondary certificates(9.1%) were also more prevalent in 2025 compared to 2017, signaling an increase in trade and skilled positions that do not require four or more years in higher education. Being comparatively more skewed towards high skilled, high wage positions explains the improvement in living wage jobs availability between 2017 and 2025.

5.4. Correlation Between Education and Wages³¹

The relationship between education and wages is more pronounced in June 2025 than it was June 2017. Although in both time periods, more years of education translates to higher pay, in 2025 an additional year of education translates to a \$4.04, while in 2017 it translated to a \$3.90 increase. This is primarily due to the higher comparative wages in 2025 for positions requiring associate's degrees, with an average entry level wage of \$26.94, \$1.95 higher than in 2017; positions requiring bachelor's degrees, with an average entry level wage of \$31.75, \$3.41 higher than in 2017; and positions requiring master's degrees, with an average entry level wage of \$34.29, \$1.74 higher than in 2017.

Figure 5.2: Real Hourly Wages in 2025 Dollars by Education in GO Virginia Region 3



³¹ All wages are real wages in 2025 dollars.

5.5. Job Availability in the Controlled Environment Agriculture Industry

There is only one controlled environment agriculture company with job postings in the GO Virginia 3 Region: AeroFarms, which opened a vertical farming facility in Danville in 2022; therefore, a comparison between 2017 and 2025 is not possible.

5.6. Job Availability in the Advanced Manufacturing Industry

Manufacturing is the fifth largest sector by job openings in the GO Virginia 3 Region in June 2025, with 401 openings, and it remains a targeted industry in the region as announcements of advanced manufacturing employers expanding in Southern Virginia continue. Table 5.10 shows the occupations in the GO Virginia 3 Region manufacturing sector with five or more postings during the month of June. Other production workers had the most openings in June 2025 with 48 job posts. This was followed by general maintenance and repair workers (38), stockers and order fillers (34), and laborers and freight, stock, and material movers (24).

Table 5.10: Job Openings by Occupation in the Manufacturing Sector in GO Virginia Region 3, June 2025

| Occupation | Job Openings |
|--|--------------|
| Production Workers, All Other | 48 |
| Maintenance and Repair Workers, General | 38 |
| Stockers and Order Fillers | 34 |
| Laborers and Freight, Stock, and Material Movers, Hand | 24 |
| First-Line Supervisors of Production and Operating Workers | 16 |
| Heavy and Tractor-Trailer Truck Drivers | 11 |
| Industrial Production Managers | 9 |
| Industrial Truck and Tractor Operators | 9 |
| Printing Press Operators | 7 |
| Electrical Engineers | 6 |
| Human Resources Specialists | 5 |
| Quality Control Analysts | 5 |
| Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel | 5 |
| Shipping, Receiving, and Inventory Clerks | 5 |

Source: Chmura & JobsEQ

Table 5.11 compares manufacturing job openings by wage range in GO Virginia Region 3 during June 2025 to June 2017. The increase in state minimum wage and the wage inflation created by the pandemic aftermath have shifted the wage distribution up over time. Two-thirds of all job openings in 2025 were between \$15 and \$25, compared to only one quarter in 2017. More than half of the job openings in 2017 paid between \$9 and \$15. Adjusted for inflation, these wages translate to \$11.85 to \$19.75 in 2025 dollars, suggesting that the regional increase in wages is not only due to inflation but also represents real gains for workers.

Table 5.11: Job Openings by Pay Range in the Manufacturing Sector in GO Virginia Region 3

| Wage Range | June 2025 | | June 2017 | |
|-------------------|-----------|-------|-----------|-------|
| | Volume | (%) | Volume | (%) |
| \$7.25 - \$8.99 | NA | NA | 6 | 2.4% |
| \$9.00 - \$10.99 | NA | NA | 59 | 23.9% |
| \$11.00 - \$12.99 | 5 | 1.2% | 36 | 14.6% |
| \$13.00 - \$14.99 | 13 | 3.2% | 33 | 13.4% |
| \$15.00 - \$17.99 | 108 | 26.9% | 21 | 8.5% |
| \$18.00 - \$19.99 | 87 | 21.7% | 17 | 6.9% |
| \$20.00 - \$24.99 | 76 | 19.0% | 24 | 9.7% |
| \$25.00 - \$29.99 | 44 | 11.0% | 19 | 7.7% |
| \$30.00 - \$39.99 | 26 | 6.5% | 15 | 6.1% |
| \$40.00 and up | 42 | 10.5% | 17 | 6.9% |

Source: Chmura & JobsEQ

Notwithstanding these gains in manufacturing wages, the economic situation has not improved for every household. The increase in manufacturing wages has enhanced the prospects of families with two working adults and households with only one child. However, the increase has not been significant enough to improve the availability of earning a living wage for families with more than one child.

Table 5.12: Percentage of Job Openings above Living Wage Jobs in GO Virginia Region 3, Advanced Manufacturing

| Family Type | June 2025 | June 2017 |
|---------------------------------|-----------|-----------|
| 1 Adult | 100% | 98% |
| 1 Adult 1 Child | 58% | 45% |
| 1 Adult 2 Children | 28% | 35% |
| 1 Adult 3 Children | 15% | 20% |
| 2 Adults (1 working) | 73% | 63% |
| 2 Adults (1 working) 1 Child | 45% | 45% |
| 2 Adults (1 working) 2 Children | 33% | 39% |
| 2 Adults (1 working) 3 Children | 22% | 26% |
| 2 Adults | 100% | 99% |
| 2 Adults 1 Child | 99% | 95% |
| 2 Adults 2 Children | 94% | 70% |
| 2 Adults 3 Children | 57% | 53% |

Source: Chmura Economics and Analytics

In June 2017, the manufacturing sector was the seventh largest industry with 247 job postings, showing the expansion that the manufacturing sector has undergone in recent years. Table 5.13 shows the occupations with over five job postings in Jun 2017. The largest occupation by job posting was laborers and freight, stock, and material movers, with 18 job posts. This was followed by general maintenance and repair workers (15), other production workers (14), and stockers and order fillers (11).

Table 5.13: Job Openings by Occupation in the Manufacturing Sector in GO Virginia Region 3, June 2017

| Occupation | Job Openings |
|--|--------------|
| Laborers and Freight, Stock, and Material Movers, Hand | 18 |
| Maintenance and Repair Workers, General | 15 |
| Production Workers, All Other | 14 |
| Stockers and Order Fillers | 11 |
| First-Line Supervisors of Production and Operating Workers | 8 |
| Heavy and Tractor-Trailer Truck Drivers | 8 |
| Industrial Truck and Tractor Operators | 6 |
| Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel | 6 |
| Textile Knitting and Weaving Machine Setters, Operators, and Tenders | 6 |
| Business Operations Specialists, All Other | 5 |
| Computer Numerically Controlled Tool Operators | 5 |
| First-Line Supervisors of Mechanics, Installers, and Repairers | 5 |
| Inspectors, Testers, Sorters, Samplers, and Weighers | 5 |

Source: Chmura & JobsEQ

6. Analysis of Regional Capacity

The next task of this research is to evaluate whether GO Virginia Region 3 has the capacity to fill living wage jobs. Chmura used its proprietary JobsEQ technology platform to complete this task. Chmura first determined the current available workforce in the region that can fill those jobs—including currently unemployed workers and potential new entrants to the labor force. Chmura's JobsEQ technology platform contains information on the industry and occupation's unemployed workers in the region. Based on the latest unemployment rate of 4.9% in June 2025, Chmura estimated that there are 6,357 unemployed workers in the region.³² Using employment characteristics data from JobsEQ, Chmura allocated them into major occupation groups. In addition, Chmura estimates the annual new labor supply into the regional workforce. Chmura's JobsEQ estimated annual new entries into the labor market at 8,169.³³

Table 6.1: Workforce Availability and Job Openings, Q1 2025

| Occupation Groups | Available Workforce | Job Openings | Labor Surplus |
|--|---------------------|---------------|---------------|
| | June 2025 | Q1, 2025 | |
| Architecture and engineering | 98 | 179 | -81 |
| Arts, design, entertainment, sports, and media | 163 | 352 | -189 |
| Building and grounds cleaning and maintenance | 619 | 477 | 142 |
| Business and financial operations | 540 | 370 | 170 |
| Community and social service | 299 | 690 | -391 |
| Computer and mathematical | 144 | 161 | -17 |
| Construction and extraction | 543 | 352 | 191 |
| Education, training, and library | 833 | 563 | 270 |
| Farming, fishing, and forestry | 177 | 20 | 157 |
| Food preparation and serving related | 1801 | 1,076 | 725 |
| Healthcare practitioners and technical | 434 | 3,854 | -3,420 |
| Healthcare support | 1222 | 820 | 402 |
| Installation, maintenance, and repair | 494 | 727 | -233 |
| Legal | 36 | 18 | 18 |
| Life, physical, and social science | 78 | 174 | -96 |
| Management | 786 | 1,081 | -295 |
| Office and administrative support | 1281 | 958 | 323 |
| Personal care and service | 498 | 178 | 320 |
| Production | 1186 | 359 | 827 |
| Protective service | 392 | 196 | 196 |
| Sales and related | 1346 | 1,631 | -285 |
| Transportation and material moving | 1513 | 1,147 | 366 |
| Total | 14,483 | 15,383 | -900 |

Note: A negative number implies there is a labor shortage in those occupations

Source: Chmura Economics & Analytics

Table 6.1 lists the current job openings in the GO Virginia 3 Region as well as the available workforce. In 2025 Q1, the GO Virginia 3 Region had an estimated available workforce of 14,838. With open positions of 15,383, it indicates that the number of available positions exceeds the available workforce in the region, with a labor supply shortage of 900. By far, the largest shortage was in the healthcare professionals and technical occupation group, with only 434 available workers but 3,854 available positions, giving a shortage of 3,420.

³² Source: BLS.

³³ New entrants into the workforce are projected workers who will enter the labor force after they graduate from high school, 2-year, or 4-year colleges. Despite the fact that they may not enter the workforce until summer, Chmura chose to include those in the analysis. This is to demonstrate that for some job openings, even considering potential new entries, the region may still not have a sufficient workforce to fill those positions.

This was followed by community and social service positions, management positions, and sales and related positions with shortages of 391, 295, and 285, respectively. Installation, maintenance, and repair (-233) and arts, design, entertainment, sports, and media (-189) positions also had large labor shortages in the region. Overall, nine of the 22 occupation groups were experiencing labor shortages in 2025 Q1.

On the other hand, there are some occupations where the available workforce exceeds available jobs. Chief among them are production positions, which are concentrated in the manufacturing industry, with an available workforce of 1,186 and 359 active job postings in 2025 Q1, leaving a labor surplus of 827. This was followed by food preparation and serving related positions with a surplus of 725. Large labor surpluses were more widespread than labor shortages in the area, with 13 of the 22 occupation groups showing labor surpluses, 12 of which have surpluses of over 100 workers (compared to six occupation groups with labor shortages). Overall, shortages were driven primarily by one occupation group, healthcare practitioners and technical occupations, while surpluses were broad.

Table 6.2 lists the job openings in GO Virginia Region 3 by major occupation group for job posts with wages greater than or equal to the average living wage of \$14.56. For living wage jobs, the available workforce exceeds available positions in the region, suggesting that the labor shortages were driven by lower-wage positions.

When filtering for living wage jobs, the sales and related occupations group went from a shortage without filtering to a surplus with filtering. Three hundred ninety-six positions were not available at the living wage, changing the unfiltered labor shortage of 285 to a filtered labor surplus of 111 workers. Food preparation and serving related positions, which already had a surplus of available workers, lost 327 available positions, bringing the labor surplus from 725 workers to 1,052 workers. The labor surplus for building and grounds cleaning and maintenance occupations expanded by 111 workers to 253. Transportation and material moving occupations lost 117 available positions and office and administrative support occupations lost 107 available positions when filtering for living wages, bringing their surpluses to 483 and 430, respectively. Although arts, design, entertainment, sports, and media occupations remained in a labor shortage, it lost 151 open positions after filtering, bringing its 189-worker labor shortage down to a shortage of just 38.

Higher-wage occupation groups did not lose as many open positions when filtering for living wages. Notably, healthcare practitioners and technical occupations only lost 16 positions after filtering. The fundamental challenge for the GO Virginia 3 Region remains that displaced workers, especially those in less specialized fields, are unable to find job opportunities with wages that can support them and their families. With unfiltered jobs in labor shortage, but jobs filtered for living wage in surplus, it is imperative to improve the quality of jobs in the region.

Table 6.2: Workforce Availability and Job Opening Above Living Wage

| Occupation Groups | Available Workforce June 2025 | Job Opening Q1, 2025 | Labor Surplus |
|--|----------------------------------|-------------------------|---------------|
| | | | |
| Architecture and engineering | 98 | 176 | -78 |
| Arts, design, entertainment, sports, and media | 163 | 201 | -38 |
| Building and grounds cleaning and maintenance | 619 | 366 | 253 |
| Business and financial operations | 540 | 367 | 173 |
| Community and social service | 299 | 649 | -350 |
| Computer and mathematical | 144 | 161 | -17 |
| Construction and extraction | 543 | 347 | 196 |
| Education, training, and library | 833 | 518 | 315 |
| Farming, fishing, and forestry | 177 | 20 | 157 |
| Food preparation and serving related | 1801 | 749 | 1,052 |
| Healthcare practitioners and technical | 434 | 3,838 | -3,404 |
| Healthcare support | 1222 | 774 | 448 |
| Installation, maintenance, and repair | 494 | 706 | -212 |
| Legal | 36 | 16 | 20 |
| Life, physical, and social science | 78 | 174 | -96 |
| Management | 786 | 1,067 | -281 |
| Office and administrative support | 1281 | 851 | 430 |
| Personal care and service | 498 | 137 | 361 |
| Production | 1,186 | 335 | 851 |

| | | | |
|------------------------------------|---------------|---------------|------------|
| Protective service | 392 | 182 | 210 |
| Sales and related | 1,346 | 1,235 | 111 |
| Transportation and material moving | 1,513 | 1,030 | 483 |
| Total | 14,483 | 13,899 | 584 |

Note: A negative number implies there is a labor shortage in those occupations

Source: Chmura Economics & Analytics

7. Demand Forecast

The final task of this analysis is to forecast the demand for jobs in the GO Virginia 3 region in order to assess the living wage jobs availability in the region as the region evolves and expands. Table 7.1 shows the total demand for the GO Virginia 3 region over the next five years. Total demand does not represent net expansion, but rather hiring needs to cover sector growth as well as replacements for retirements and turnover. Healthcare and social assistance comprises the highest proportion of demand with 17.2% of the total 5-year forecasted demand in the region, matching the high proportion of jobs in the sector. Demand is also expected to be high in the retail trade sector (13.8%), accommodation and food services sectors (13.8%), and the manufacturing sector (12.6%).

Table 7.1: GO Virginia Region 3 Total Demand Forecast

| Sector | 2025 Q1 Employment | Average Annual Wages | Five-Year Total Demand | Proportion of Total Demand | Average Annual Growth |
|--|--------------------|----------------------|------------------------|----------------------------|-----------------------|
| Health Care and Social Assistance | 20,949 | \$48,892 | 10,921 | 17.3% | 0.5% |
| Manufacturing | 17,231 | \$61,245 | 7,940 | 12.6% | -0.7% |
| Retail Trade | 14,084 | \$31,465 | 8,739 | 13.8% | -1.0% |
| Educational Services | 13,654 | \$47,715 | 6,099 | 9.7% | -0.3% |
| Accommodation and Food Services | 10,047 | \$23,362 | 8,727 | 13.8% | -0.3% |
| Public Administration | 8,280 | \$55,749 | 3,584 | 5.7% | -0.4% |
| Construction | 5,595 | \$59,572 | 2,365 | 3.7% | -0.1% |
| Transportation and Warehousing | 5,422 | \$52,806 | 2,868 | 4.5% | -0.2% |
| Administrative and Support and Waste Management and Remediation Services | 5,261 | \$40,458 | 2,897 | 4.6% | -0.3% |
| Wholesale Trade | 3,791 | \$73,310 | 1,805 | 2.9% | -0.4% |
| Other Services (except Public Administration) | 3,546 | \$37,783 | 1,963 | 3.1% | -0.3% |
| Professional, Scientific, and Technical Services | 3,087 | \$68,469 | 1,309 | 2.1% | 0.3% |
| Finance and Insurance | 2,016 | \$77,815 | 772 | 1.2% | -0.5% |
| Agriculture, Forestry, Fishing and Hunting | 1,702 | \$52,184 | 937 | 1.5% | -1.0% |
| Arts, Entertainment, and Recreation | 1,346 | \$27,833 | 991 | 1.6% | 0.1% |
| Management of Companies and Enterprises | 958 | \$100,547 | 411 | 0.7% | 0.2% |
| Real Estate and Rental and Leasing | 929 | \$46,168 | 422 | 0.7% | -0.5% |
| Information | 883 | \$51,948 | 372 | 0.6% | -0.2% |
| Utilities | 707 | \$95,800 | 328 | 0.5% | 0.5% |
| Mining, Quarrying, and Oil and Gas Extraction | 227 | \$64,473 | 105 | 0.2% | 0.1% |
| Total | 119,715 | \$48,929 | 63,555 | 100% | -0.3% |

Source: Chmura Economics & Analytics

Labor demand in the GO Virginia 3 region is expected to be highest in low-to-mid wage fields over the next five years, with the highest proportion of demand in the \$13.00 to \$14.99 wage range, which includes high-turnover occupations such as fast food and counter workers, personal care aides, and cashiers, according to current wages (19.3% of total demand). This wage range is followed by the \$20.00 to \$24.99 wage range with 18.9% of total demand and the \$15.00 to \$17.99 wage range with 18.1% of total forecasted demand over the next five years. The \$20.00 to \$24.99 wage range includes first-line supervisors of food preparation workers and retail sales workers, office clerks, and production occupations such as team assemblers. The \$15.00 to \$17.99 wage range includes food preparation workers, teaching assistants, and landscaping and groundskeeping workers.

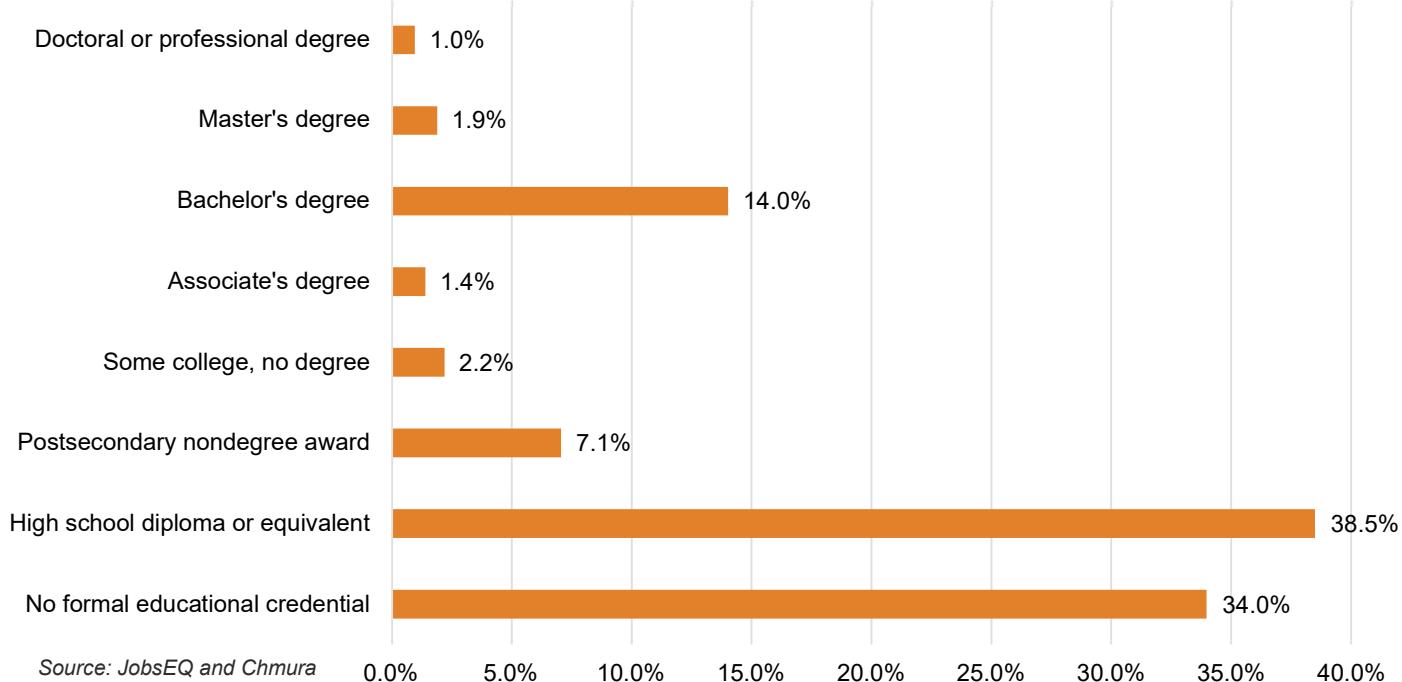
Table 7.2: Total Demand Forecast by Pay Range in GO Virginia Region 3

| 2025 Q1 Wage Range | 5-Year Forecasted Demand | Wage Range Distribution |
|-----------------------|--------------------------|-------------------------|
| \$12.41 - \$12.99 | 10 | 0.0% |
| \$13.00 - \$14.99 | 13,442 | 19.3% |
| \$15.00 - \$17.99 | 12,615 | 18.1% |
| \$18.00 - \$19.99 | 10,285 | 14.8% |
| \$20.00 - \$24.99 | 13,148 | 18.9% |
| \$25.00 - \$29.99 | 7,281 | 10.4% |
| \$30.00 - \$39.99 | 7,159 | 10.3% |
| \$40.00 and up | 5,756 | 8.3% |

Source: Chmura & JobsEQ

Over the next five years, the majority of total demand in the GO Virginia 3 region will be for occupations that require a lower level of education, with 72.5% of forecasted demand for occupations not requiring post-secondary education (34.0% requiring no education credential and 38.5% requiring a high school diploma or equivalent). This high-level of total demand for these lower-skill, lower-wage positions is largely due to the high turnover rates in the retail and food services sectors, which often require lower levels of education. Despite having lower total demand (which includes both growth and turnover), occupations requiring higher levels of education with higher pay ranges, especially those in the health care and social assistance sectors such as nurse practitioners, are expected to grow over the next five years.

Figure 7.1: 5-Year Forecasted Demand by Educational Requirement in GO Virginia Region 3



Source: JobsEQ and Chmura

Appendix

Job Openings in Manufacturing Sector by Occupation, Amelia County, 2025 Q1

| Occupation | Job Openings |
|--|--------------|
| First-Line Supervisors of Helpers, Laborers, and Material Movers, Hand | 1 |
| Human Resources Specialists | 1 |
| Laborers and Freight, Stock, and Material Movers, Hand | 1 |

Source: Chumra & Jobs EQ

Job Openings in Manufacturing Sector by Occupation, Brunswick County, 2025 Q1

| Occupation | Job Openings |
|----------------------------|--------------|
| Lawyers | 1 |
| Stockers and Order Fillers | 1 |

Source: Chumra & Jobs EQ

Job Openings in Manufacturing Sector by Occupation, Charlotte County, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| Laborers and Freight, Stock, and Material Movers, Hand | 2 |
| Light Truck Drivers | 1 |
| Water and Wastewater Treatment Plant and System Operators | 1 |

Source: Chumra & Jobs EQ

Job Openings in Manufacturing Sector by Occupation, Cumberland County, 2025 Q1

| Occupation | Job Openings |
|--|--------------|
| Maintenance and Repair Workers, General | 4 |
| First-Line Supervisors of Production and Operating Workers | 3 |
| Tool and Die Makers | 3 |
| Shipping, Receiving, and Inventory Clerks | 2 |
| Inspectors, Testers, Sorters, Samplers, and Weighers | 1 |

Source: Chumra & Jobs EQ

To 20 Occupations by Job Openings in the Manufacturing Sector, Danville City, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| First-Line Supervisors of Production and Operating Workers | 18 |
| Maintenance and Repair Workers, General | 17 |
| Production Workers, All Other | 13 |
| Laborers and Freight, Stock, and Material Movers, Hand | 9 |
| Quality Control Analysts | 9 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 8 |
| Electrical Engineers | 7 |
| Stockers and Order Fillers | 7 |
| Human Resources Specialists | 5 |

| | |
|--|---|
| Automotive Service Technicians and Mechanics | 4 |
| Construction Laborers | 4 |
| Electrical and Electronic Engineering Technologists and Technicians | 4 |
| Heating, Air Conditioning, and Refrigeration Mechanics and Installers | 4 |
| Industrial Machinery Mechanics | 4 |
| Industrial Truck and Tractor Operators | 4 |
| Machinists | 4 |
| Printing Press Operators | 4 |
| Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel | 4 |
| Secretaries and Administrative Assistants, Except Legal, Medical, and Executive | 4 |
| Shipping, Receiving, and Inventory Clerks | 4 |

Source: Chumra & Jobs EQ

To 20 Occupations by Job Openings in the Manufacturing Sector, Halifax County, 2025 Q1

| Occupation | Job Openings |
|--|--------------|
| Maintenance and Repair Workers, General | 17 |
| First-Line Supervisors of Mechanics, Installers, and Repairers | 8 |
| Electrical Engineers | 6 |
| First-Line Supervisors of Production and Operating Workers | 6 |
| Architectural and Engineering Managers | 5 |
| Industrial Truck and Tractor Operators | 5 |
| Inspectors, Testers, Sorters, Samplers, and Weighers | 5 |
| Occupational Health and Safety Specialists | 5 |
| Production Workers, All Other | 5 |
| Construction Managers | 4 |
| Human Resources Specialists | 4 |
| Industrial Engineers | 4 |
| Mechanical Drafters | 4 |
| Laborers and Freight, Stock, and Material Movers, Hand | 3 |
| Mechanical Engineers | 3 |
| Quality Control Analysts | 3 |
| Stockers and Order Fillers | 3 |
| Welders, Cutters, Solderers, and Brazers | 3 |
| Business Operations Specialists, All Other | 2 |
| Computer User Support Specialists | 2 |

Source: Chumra & Jobs EQ

To 20 Occupations by Job Openings in the Manufacturing Sector, Henry County, 2025 Q1

| Occupation | Job Openings |
|--|--------------|
| Production Workers, All Other | 19 |
| Laborers and Freight, Stock, and Material Movers, Hand | 18 |
| First-Line Supervisors of Production and Operating Workers | 11 |

| | |
|---|---|
| Maintenance and Repair Workers, General | 7 |
| Stockers and Order Fillers | 7 |
| Food Preparation Workers | 6 |
| Heavy and Tractor-Trailer Truck Drivers | 5 |
| Business Operations Specialists, All Other | 4 |
| Customer Service Representatives | 4 |
| Human Resources Specialists | 4 |
| Industrial Truck and Tractor Operators | 4 |
| Packers and Packagers, Hand | 4 |
| Secretaries and Administrative Assistants, Except Legal, Medical, and Executive | 3 |
| Bookkeeping, Accounting, and Auditing Clerks | 2 |
| Chemists | 2 |
| First-Line Supervisors of Office and Administrative Support Workers | 2 |
| Human Resources Managers | 2 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 2 |
| Quality Control Analysts | 2 |
| Quality Control Systems Managers | 2 |

Source: Chumra & Jobs EQ

Job Openings in Manufacturing Sector by Occupation, Lunenburg County, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| Farmworkers and Laborers, Crop, Nursery, and Greenhouse | 1 |
| Industrial Truck and Tractor Operators | 1 |
| Laborers and Freight, Stock, and Material Movers, Hand | 1 |
| Retail Salespersons | 1 |

Source: Chumra & Jobs EQ

To 20 Occupations by Job Openings in the Manufacturing Sector, Martinsville City, 2025 Q1

| Occupation | Job Openings |
|--|--------------|
| Retail Salespersons | 3 |
| Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel | 3 |
| Construction and Building Inspectors | 2 |
| Light Truck Drivers | 2 |
| Maintenance and Repair Workers, General | 2 |
| Merchandise Displayers and Window Trimmers | 2 |
| Aircraft Mechanics and Service Technicians | 1 |
| Architectural and Engineering Managers | 1 |
| Computer and Information Systems Managers | 1 |
| Customer Service Representatives | 1 |
| Heavy and Tractor-Trailer Truck Drivers | 1 |
| Industrial Truck and Tractor Operators | 1 |
| Laborers and Freight, Stock, and Material Movers, Hand | 1 |

| | |
|--|---|
| Machinists | 1 |
| Network and Computer Systems Administrators | 1 |
| Paramedics | 1 |
| Pharmacy Technicians | 1 |
| Production Workers, All Other | 1 |
| Purchasing Managers | 1 |
| Securities, Commodities, and Financial Services Sales Agents | 1 |

Source: Chumra & Jobs EQ

To 20 Occupations by Job Openings in the Manufacturing Sector, Mecklenburg City, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| Maintenance and Repair Workers, General | 13 |
| Production Workers, All Other | 8 |
| Architectural and Engineering Managers | 6 |
| Bus and Truck Mechanics and Diesel Engine Specialists | 3 |
| Occupational Health and Safety Specialists | 3 |
| Automotive Service Technicians and Mechanics | 2 |
| Business Operations Specialists, All Other | 2 |
| Computer User Support Specialists | 2 |
| First-Line Supervisors of Retail Sales Workers | 2 |
| Industrial Machinery Mechanics | 2 |
| Retail Salespersons | 2 |
| Secretaries and Administrative Assistants, Except Legal, Medical, and Executive | 2 |
| Assemblers and Fabricators, All Other | 1 |
| Construction and Building Inspectors | 1 |
| Drywall and Ceiling Tile Installers | 1 |
| Electricians | 1 |
| First-Line Supervisors of Mechanics, Installers, and Repairers | 1 |
| First-Line Supervisors of Production and Operating Workers | 1 |
| General and Operations Managers | 1 |
| Heavy and Tractor-Trailer Truck Drivers | 1 |

Source: Chumra & Jobs EQ

Job Openings in Manufacturing Sector by Occupation, Nottoway County, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| Merchandise Displayers and Window Trimmers | 2 |
| Stockers and Order Fillers | 2 |
| Cleaners of Vehicles and Equipment | 1 |
| Customer Service Representatives | 1 |
| Driver/Sales Workers | 1 |
| First-Line Supervisors of Office and Administrative Support Workers | 1 |
| Maintenance and Repair Workers, General | 1 |

| | |
|---|---|
| Medical Secretaries and Administrative Assistants | 1 |
| Production Workers, All Other | 1 |

Source: Chumra & Jobs EQ

Job Openings in Manufacturing Sector by Occupation, Patrick County, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| Computer Numerically Controlled Tool Operators | 3 |
| Maintenance and Repair Workers, General | 2 |
| Production Workers, All Other | 2 |
| Computer Numerically Controlled Tool Programmers | 1 |
| Electro-Mechanical and Mechatronics Technologists and Technicians | 1 |
| First-Line Supervisors of Production and Operating Workers | 1 |
| Furnace, Kiln, Oven, Drier, and Kettle Operators and Tenders | 1 |
| Inspectors, Testers, Sorters, Samplers, and Weighers | 1 |
| Janitors and Cleaners, Except Maids and Housekeeping Cleaners | 1 |
| Laborers and Freight, Stock, and Material Movers, Hand | 1 |
| Music Directors and Composers | 1 |
| Parking Attendants | 1 |
| Retail Salespersons | 1 |
| Textile, Apparel, and Furnishings Workers, All Other | 1 |

Source: Chumra & Jobs EQ

To 20 Occupations by Job Openings in the Manufacturing Sector, Pittsylvania County, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| Laborers and Freight, Stock, and Material Movers, Hand | 13 |
| Production Workers, All Other | 10 |
| Human Resources Specialists | 6 |
| Shipping, Receiving, and Inventory Clerks | 6 |
| Stockers and Order Fillers | 6 |
| First-Line Supervisors of Production and Operating Workers | 3 |
| Maintenance and Repair Workers, General | 3 |
| Accountants and Auditors | 2 |
| First-Line Supervisors of Food Preparation and Serving Workers | 2 |
| Packers and Packagers, Hand | 2 |
| Butchers and Meat Cutters | 1 |
| Electrical and Electronics Repairers, Commercial and Industrial Equipment | 1 |
| Electrical Engineers | 1 |
| Environmental Scientists and Specialists, Including Health | 1 |
| Farmers, Ranchers, and Other Agricultural Managers | 1 |
| First-Line Supervisors of Mechanics, Installers, and Repairers | 1 |
| First-Line Supervisors of Retail Sales Workers | 1 |
| Information Technology Project Managers | 1 |

| | |
|---|---|
| Mechanical Drafters | 1 |
| Medical Secretaries and Administrative Assistants | 1 |

Source: Chumra & Jobs EQ

Job Openings in Manufacturing Sector by Occupation, Patrick County, 2025 Q1

| Occupation | Job Openings |
|---|--------------|
| Assemblers and Fabricators, All Other | 1 |
| Heating, Air Conditioning, and Refrigeration Mechanics and Installers | 1 |
| Industrial Machinery Mechanics | 1 |

Source: Chumra & Jobs EQ

Top 20 Certifications in Manufacturing Sector Job Openings, GO Virginia Region 3, 2025 Q1

| Occupation | Proportion of Manufacturing Job Openings with Specified Certifications |
|--|--|
| Commercial Driver's License (CDL) | 17.5% |
| Certification in Cardiopulmonary Resuscitation (CPR) | 8.5% |
| OSHA 30 | 4.9% |
| First Aid Certification | 4.5% |
| Automotive Service Excellence (ASE) Certification | 3.7% |
| Certified Public Accountant (CPA) | 3.7% |
| Class A Commercial Driver's License (CDL-A) | 3.7% |
| EPA Universal Certification | 3.7% |
| OSHA 10 | 3.7% |
| Certified Safety Professional (CSP) | 3.3% |
| Project Management Professional (PMP) | 3.3% |
| EPA Section 608 Certification (EPA 608) | 2.8% |
| Secret Clearance | 2.4% |
| Licensed Professional Engineer | 2.0% |
| OSHA 500 | 2.0% |
| Certified Industrial Hygienist (CIH) | 1.6% |
| Certified Welding Inspector (CWI) | 1.6% |
| Engineer in Training (EIT) | 1.6% |
| Forklift Certified | 1.6% |
| HAZMAT | 1.6% |

Source: Chumra & Jobs EQ

OLD BUSINESS

PROJECT PIPELINE



DATE: January 15, 2026

TO: Region 3 Executive Committee

FROM: R. Bryan David, Program Director

A handwritten signature in blue ink that appears to read 'R. Bryan David'.

RE: Project Pipeline Report

Below is information about projects that are in varying stages of development:

I. CEA Innovation Center Research Building Expansion

-Dr. Scott Lowman has shown that the greenhouses currently used for contract research by CEA firms and other academic institutions are at capacity, creating a backlog of work. Contract research is a source of operating revenue for the CEA Innovation Center.

-the project would involve installing a prefabricated research greenhouse, making associated building improvements, and preparing the site and utilities.

-a grant application to the Southern Crescent Regional Commission (SCRC) was submitted earlier this year for the project. On December 2nd, Dr. Lowman received word from the Virginia Department of Housing and Community Development that the grant had been approved.

-a Tobacco Region Revitalization Commission application for the fall grant cycle was submitted to supplement project costs, but action was deferred until the SCRC grant decision was made. It is anticipated that this grant can now be approved.

-a GO Virginia Region 3 will now pursue a single-region competitive grant to research greenhouse equipment, with a funding request of approximately \$250-\$500. Submission is targeted for the April 2026 Region 3 Council meeting. This single-region competitive grant is required because Region 3 has exhausted its 2025-2026 Per Capita grant funds.

II. Virginia's Heartland Regional Economic Development Alliance

-after continuing discussions and collaboration with the Heartland Alliance's Executive Director, Alex McCoy, there is an opportunity for a business site planning project to determine the inventory of available business investment sites and buildings in the region, each site's VEDP tier level, and to analyze opportunities for up-tiering the regional priority properties.



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-a draft application and budget were prepared by the Commonwealth Regional Council on behalf of the Heartland Alliance and submitted on 12.10.25 for staff review. Because this is a \$100k planning project (2025-2026 per capita planning funds reserved), the application can be administratively reviewed and approved by DHCD GO Virginia staff. The next feasible submission date is 3.27.26. Consequently, the Executive Committee would need to meet on March 18th for review and approval.

-a meeting with Alex McCoy (Heartland Alliance Executive Director) and Christin Jackson (Commonwealth Regional Council) was held on 1.8.26 to review application development to date and plan next steps. The application should be available to the Executive Committee at its meeting on 3.18.26 to meet the submission deadline of 3.27.26.

III. Farm Park Implementation Playbook (data center/CEA greenhouse colocation)

-this project will be a planning project that builds on the recent feasibility report on the colocation of data centers and CEA greenhouses prepared by Resource Innovation Institute.

-the planning scope will include a number of elements as outlined in the attached working draft. The total Region 3 per capita planning budget will be \$150k, apportioned among the project elements, with no single element exceeding \$100k (2025-2026 per capita planning funds reserved). This approach has been discussed with DHCD GO Virginia staff.

-the application, budget, and deliverables will be submitted by the Institute for Advanced Learning and Research in partnership with the Resource Innovation Institute.

-because this is a planning project seeking administrative approval by DHCD GO Virginia staff the next feasible submission date would be 3.27.26.

-several meetings with principals at the Resource Innovation Institute have occurred, and application development is proceeding with a target date for review by the Executive Committee at its meeting on 3.18.26 to meet the submission deadline on 3.27.26.

-attached is an outline of the elements for the Farm Park Implementation Playbook.

IV. Virginia AI Innovation Hub & Venture Studios

-the Smart Innovation Corporation (non-profit) proposes to develop an industry-aligned workforce development program to support individuals pursuing careers in artificial intelligence, data analytics, and applied machine learning, and to support employees of existing businesses in the use of AI in the workplace.



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Additionally, the program would provide training for local, state, and federal government employees on the use of AI in the workplace.

-the project principals have experience and credentials in technology workforce development. One of the principals was raised in Halifax County.

-the project principals have met with the Region 7 Program Director, who has expressed interest. A follow-up meeting between the Region 7 and Region 3 Program Directors will be held.

-it is understood that the project principals were awarded and successfully implemented a GO Virginia workforce development grant from Region 7 involving cybersecurity.

-this would be a multi-region project for GO Virginia Regions 3 (Southern Virginia) and 7 (Northern Virginia).

-project concept, budget, schedule, and deliverables under development by SIC principals.

-the concept will be further developed, given the recent release of the Virginia State Chamber of Commerce's Blueprint Virginia 2035 and the full AI in the Workplace Component this month.

V. Metals Workforce Training Center

-this project is being developed by the Town of Bedford Economic Development Authority following a successful feasibility and master plan project funded by GO Virginia Region 2.

-the facility is at the site of the former Winoa USA steel shot foundry, which includes a 60,000-square-foot industrial facility on 16 acres near downtown Bedford. The property was acquired by the Bedford Economic Development Authority in 2023.

-the Institute for Advanced Learning and Research may be interested in partnering on project implementation. A discovery meeting for the principals was held on December 16th. IALR has the opportunity under review with a follow up site visit.

-if feasible, this would be a GO Virginia Multi-Region Implementation Project sponsored by GO Virginia Regions 2 and 3.

-attached is the Executive Summary from the feasibility and master plan project.



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VI. **Region 3 Leadership Development Project**

-report completed for strategy (8.24)

-GO Virginia funding strategy under development

RECOMMENDATION:

For the Region 3 Council's information. No action is needed.

Farm Park Implementation Playbook

Purpose: A collaborative, comprehensive guide for colocating CEA greenhouses and data centers to support a pilot Farm Park in Southern Virginia.

1. Siting Rubric and Scoping Analysis

Develop a rubric to identify and prioritize locations for a pilot Farm Park, using weighted scoring, parcel comparisons, and recommend publicly controlled and available sites with development scenarios.

2. Workforce Assessment for CEA Greenhouse and Data Center Operations

Assessment of CEA greenhouse and data center workforce needs, current abilities and capacities of workforce partners to develop, operationalize, and sustain training programs, and inventory of best practices and industry credentials from outside Southern Virginia.

3. Economic, Fiscal, and Job Creation Impacts

Quantify the direct, indirect, and induced impacts of Farm Park development at the local, regional, and state levels to include permanent and construction job estimates, supply-chain effects, and projected local, regional, and state tax revenues.

4. Shared-Power Engineering and Infrastructure Assessment

Define technical requirements for colocated CEA greenhouses and data centers and the shared-power center including siting and utility criteria, capital and operating cost models, and a permitting roadmap.

5. Financing and Delivery of Shared Infrastructure

Develop a comprehensive capital funding strategy to deliver the common infrastructure required to support the Farm Park through a public-private partnership model.

6. Governance, Ownership, and Operations Framework

Establish structures for how public entities and private firms collaborate to develop, operate, and maintain a Farm Park, to include governance models, legal considerations, and local, state, and federal regulatory requirements.

7. Applied Research and Innovation Support by the Institute for Advanced Learning and Research

Integrate the Farm Park with the CEA Innovation Center's applied research and industry-support capabilities.

Feasibility and Master Plan for a Metals Workforce Training Center



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2025

Feasibility and Master Plan for a Metals Workforce Training Center in Bedford, VA

A coordinated effort is underway to establish a Bedford Metals Workforce Training Center at the site of the former Winoa USA steel shot foundry to serve the metals industry in the region. This 60,000 square-foot industrial facility, located on 16 acres near downtown Bedford, was acquired by the Bedford Economic Development Authority in 2023. The site includes high-bay spaces, a rail spur, and industrial infrastructure ideal for metals training programs. The facility's unique characteristics make it well-suited to support high-demand training areas, including welding, machining, fabrication, and potentially foundry operations.

Metal Industries in the Region

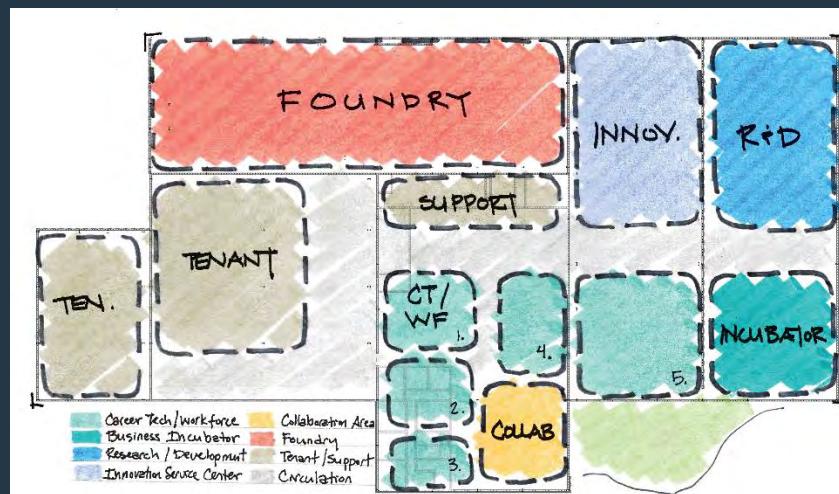
- **4,800** employed
- **\$92,000** average wage
- **2.06** location quotient

Metals Sectors

- Primary Metal Manufacturing
- Fabricated Metal Manufacturing
- Machinery Manufacturing

Potential Partners

- K-12 Schools, Community Colleges, Virginia Tech
- Industry & Trade Associations
- State and Federal Agencies



The Bedford Metals Workforce Training Center represents a timely and strategic investment in the region's economic future. It addresses immediate industry needs, capitalizes on unique site and infrastructure assets, and aligns with regional and statewide priorities in workforce development and manufacturing innovation.

Organization

- Industry Council
- Nonprofit Structure
- Fundraising

Partnerships

- Education
- Industry
- Associations

Vision

- Programming
- Incubation
- Innovation

Sponsored by



Executive Summary

The metals manufacturing sector in the Bedford, VA, region is a critical component of the local economy, with high wages, growing and established firms, and a skilled labor base. With average wages nearing \$92,000 and a strong location quotient of 2.06 for fabricated metal product manufacturing, the region significantly outpaces national averages in employment concentration. This strategic advantage is supported by strong educational infrastructure.

To capitalize on this opportunity, the Town of Bedford Economic Development Authority (EDA) purchased the 1970's vintage, 60,000 square foot industrial complex which had operated for 50 years as a foundry producing steel abrasives. The facility was closed in 2020 and purchased by the Town of Bedford EDA with the intent of creating a metal fabrication workforce development center. The center's location between Roanoke and Lynchburg on US 460 consisting of multiple high bay areas and rail access make it uniquely suitable for metal fabrication training. The facility is supplied by a 50-megawatt transformer designed for electric foundry furnace operation facilitating the potential for the nation's first metal fabrication training facility with a commercial scale foundry component. The objective of this report is to explore the feasibility of this proposed training center, provide a high-level engineering assessment of the facility and suggest a plan for the development of a first-class regional center for western Virginia having national significance.



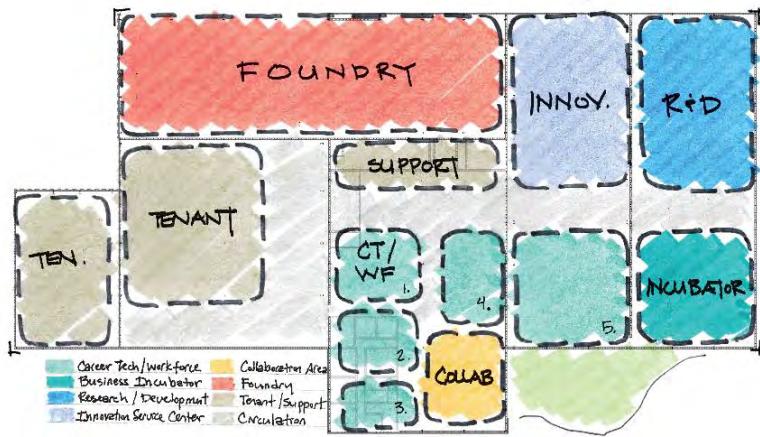
Former Wino USA Facility

Despite some projected declines in overall employment in the metals sector, the demand for specialized, skilled workers remains high. Employers across the region report persistent challenges in hiring qualified welders, machinists, and metal fabricators. Many companies have indicated that new hires often require extensive on-the-job training, especially when transitioning from educational programs that may not mirror the materials, specific equipment, or fabrication methodology used by industry. Skills in blueprint reading, measuring, materials handling, and heat treatment are also in demand, emphasizing the need for more applied, hands-on training facilities.

In response to these needs, a coordinated effort is underway to establish a Bedford Metals Workforce Training Center at the site of the former Wino USA steel shot foundry. This 60,000 square-foot industrial facility, located on 16 acres near downtown Bedford, was acquired by the Town of Bedford EDA in 2023. The site includes high-bay spaces, a rail spur, and industrial infrastructure ideal for metals training programs. Cleanup and renovation work has already begun, with funding from the Virginia Brownfields Assistance Fund. The facility's unique characteristics make it well-suited to support high-demand training areas including welding, machining, fabrication, and potentially foundry operations.

The proposed center aligns directly with Region 2 priorities under the GO Virginia initiative, particularly in scaling cluster-based technologies, attracting and retaining talent, and enhancing regional infrastructure. Employers interviewed for this feasibility study expressed strong interest in collaborating on training design and delivery. Several suggested they could contribute instructors, equipment, or proprietary training content. There was widespread support for a shared facility that could host both general workforce training and company-specific programs focused on metal fabrication skills. An industry advisory council is proposed to guide curriculum development and ensure the center remains responsive to evolving industry needs.

Education partners, including Central Virginia Community College (CVCC), Virginia Western Community College, Virginia Tech, and local public schools, have all confirmed the value of a specialized metals training facility in Bedford. Welding and CNC machining programs continue to attract students across central Virginia and student interest in short-term training remains strong. There is increasing interest in non-destructive testing (NDT), additive manufacturing, and materials science. Virginia Tech and its affiliated initiatives, such as the AM2 Tech Hub and METAL apprenticeship program, present significant partnership opportunities.



Design Concept

Bedford County Public Schools, which currently lacks metals-related CTE programs, has expressed interest in participating in dual enrollment and career exploration efforts at the new center. The facility would offer a unique platform for middle and high school engagement, including after-school programs, summer camps, and apprenticeships. Early exposure to manufacturing careers can help cultivate a future workforce pipeline and raise regional awareness of metals manufacturing careers.

In addition to workforce training, the center could include programming for entrepreneurial support, such as incubator space for start-up manufacturers or shared metal fabrication labs for prototyping and innovation. Industry engagement in these areas could be structured through memberships, fee-based services, or partnerships for research and product development.

A new nonprofit 501(c)(3) entity is recommended to administer the center. This organization would manage facility operations, enter into contracts with training providers, and coordinate industry partnerships. The nonprofit status would allow receipt of tax-deductible donations and grant funding, while its board, made up of industry and educational leaders, would provide strategic governance.

A phased development approach is proposed. Early phases will focus on establishing governance, securing renovation funding, launching initial short-term training in welding and machining, and engaging CTE and post-secondary partners. Subsequent phases may include expansion to research and prototyping services, additional education, industry and university partnerships, and potential development into a regional center of excellence.

Key funding sources may include GO Virginia, the Virginia Tobacco Region Revitalization Commission, U.S. Economic Development Administration, and national trade associations, among others. Support from regional employers, both in-kind and financial, is anticipated to play a vital role in long-term sustainability.

The Bedford Metals Workforce Training Center represents a timely and strategic investment in the region's economic future. It addresses immediate industry needs, capitalizes on unique site and infrastructure assets, and aligns with regional and statewide priorities in workforce development and manufacturing innovation. With strong industry support, committed educational partners, and an operational framework focused on flexibility and alignment, the center is poised to become a transformative hub for talent, technology, and industrial growth in Virginia.

NEW BUSINESS



DATE: January 15, 2026

TO: Region 3 Council

FROM: R. Bryan David, Program Director *(Signature)*

RE: Southern Virginia Partnership for Health Sciences Careers – Selection of Lead Organization

At its October 15th meeting, the Region 3 Council received an update on the status of the Southern Virginia Partnership for Health Science Careers (SOVA Partnership).

The following is the information that was presented:

- The Talent Pathways Initiative planning project was completed by the project principals, including the Blue Ridge Partnership for Health Science Careers (C. Lawrence) and George Mason University (Dr. C. Sutter). Dr. Julie Brown (IALR) has provided in-region leadership and staffing support to the SOVA Partnership. This report was presented to the Region 3 Council at its July 16th meeting.
- Since that time, Dr. Brown has left IALR and begun serving as Provost of Averett University. She had been serving as the in-region coordinator for the SOVA Partnership.
- A meeting of the SOVA Partnership members was held on September 12th to discuss possible paths forward to operationalize the SOVA Partnership. All expressed commitment to supporting the SOVA Partnership and its work in the future.
- At its meeting on Wednesday, September 17th, the Executive Committee received information about the SOVA Partnership's commitment to continue its work. The committee members discussed potential options for identifying a lead organization to support and coordinate the SOVA Partnership's work.
- The Executive Committee approved the preparation and posting of a Request for Letters of Interest from GO Virginia-eligible organizations to serve as the Lead Organization for the Southern Virginia Partnership for Health Science Careers (SOVA Partnership). In this role, the selected organization will prepare and submit a GO Virginia Region 3 Per Capita Implementation Grant to support and coordinate the SOVA Partnership.
- The Request for Letters of Interest was prepared and announced on Friday, September 26th. The request was sent to all members of the SOVA Partnership and posted on the GO Virginia Region 3 website. The deadline for submitting letters of interest was Wednesday, October 8th.



Region 3 Council

January 15, 2026

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- A number of organizations expressed interest in supporting the SOVA Partnership and pursuing a GO Virginia Region 3 Per Capita implementation grant to operationalize the SOVA Partnership. This interest ranged from serving as the lead organization to supporting the grant's implementation. The organizations responding to the Request for Letters of Interest were:

Averett University

Danville Community College

Longwood University

Pittsylvania County Public Schools

Southern Virginia Higher Education Center

- Region 3 Chair Lauren Willis formed a workgroup consisting of Randy Lail, Sheldon Barr (Region 3 Council member/President_VCU Community Memorial Health), and Dr. Keith Harkens (Region 3 Council member/Vice President of Academic and Workforce Programs_Southside Virginia Community College) to meet with organizations that responded to an invitation to schedule interviews. The workgroup interviewed the following organizations on December 12th:

Averett University

Danville Community College

Longwood University

- Following the workgroup's discussion, it recommended that Dr. Julie Brown, in close strategic partnership with Danville Community College and Longwood University, develop and submit a Per Capita grant application. The workgroup recommended that other healthcare stakeholder organizations be included as formal partners where appropriate for implementation purposes.
- In accordance with the workgroup's recommendation, the Executive Committee invited Dr. Julie Brown, on behalf of Averett University, to serve as the lead applicant for the grant, with Danville Community College and Longwood University providing direct support in application development, submission, and post-award grant implementation.

Dr. Brown and leadership from Danville Community College and Longwood University accepted the invitation and expressed strong enthusiasm for collaborating on the proposed initiative.

- Attached is a working timeline for the grant development phase.

RECOMMENDATION:

For the Region 3 Council's information. No action is needed.

Competitive Application Development Working Timeline

i. Pre-submission draft review by DHCD GO VA staff (~ 3.16.26)

- application (single-region competitive)
- sources and uses budget
- healthcare industry project addendum
- match verification form(s)
- milestones and drawdown schedule
- core outcomes template
- economic impact (DHCD template)
- local match waiver form

ii. Final application package to Region 3 staff (due by 3.30.26)

- application (single-region competitive)
- sources and uses budget
- healthcare industry project addendum
- match verification form(s)
- milestones and drawdown schedule
- core outcomes template
- economic impact (DHCD template)
- local match waiver form
- *letters of support*

iii. Project Review Committee

- meeting scheduled 4.6 – 10.26
- time TBD
- review application and make a recommendation to the Executive Committee

iv. Region 3 Council

- meeting scheduled for 4.15.26 from 1:00 pm – 3:00
- in-person meeting at the SOVA Innovation Hub_South Boston

v. DHCD GO Virginia Staff and State Board Review and Approval

- submission deadline 5.1.26
- staff and State Board Workgroup review 5.4 – 29.26
- Pitch Call meeting with State Board Workgroup TBD_5.18 – 22.26?
- State Board Meeting Agenda with project disposition 6.4.26
- State Board Meeting 6.9.26 (TBD on location)
- Grant award with post award contract execution ~2 – 3 weeks following State Board meeting





DATE: January 15, 2026

TO: Region 3 Council

FROM: R. Bryan David, Program Director

(Signature)

RE: Project Review Committee Report

The Project Review Committee met on Thursday, January 14th, to review the following project application and recommends its approval by the Region 3 Council as presented:

Advanced Manufacturing and Advanced Materials (AM2) Initiative to Grow Advanced Manufacturing in Virginia

- This initiative is a multi-region competitive grant in partnership with the GO Virginia Region 2 Council, with the Virginia Tech Center for Economic and Community Engagement (VT CECE) providing GO Virginia staffing support.
- The applicant principals are from the New River Valley Regional Commission (NRVRC) and another division of the Virginia Tech Center for Economic and Community Engagement.
- Preceded by a two-year Region 2 planning grant, this project will support a larger effort by VT CECE and its partners and stakeholders in Regions 2 and 3 to secure \$40MM in federal funding for the AM2 initiative.
- During the two-year planning grant, it was noted that "...additive manufacturing and advanced materials have become key drivers to reshore and transform US manufacturing. These technologies increase manufacturing speeds, improve the quality of parts and products, and support an evolving global landscape."
- Four (4) areas of focus for this GO Virginia multi-region competitive project for Regions 2 and 3 will include:
 - i. **AM2 Studios** – Assisting existing manufacturers in designing, refining, and testing technologies and processes to improve their efficiency and productivity, resulting in regional job and Gross Regional Product growth.
 - ii. **AM2 Career Network** – Strengthening the manufacturing career pipeline by developing curriculum and high-quality work-based learning opportunities from middle school through graduate school.
 - iii. **AM2 Fellows** – Accelerating the commercialization timeline for regional manufacturers to promote sustained economic vitality and global competitiveness.
 - iv. **AM2 Consortium** – Coordinating all AM2 activities to improve collaboration among manufacturers, streamline and facilitate access to services, and help attract and grow regional manufacturers.



Region 3 Council
January 15, 2026
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- The project will be tracked by an AM2 Executive Council, with support staff from VT CECE and NRVRC.

Funding and Match (2:1_GO VA/Partner Match):

The proposed budget (working draft with approximate values rounded) for the project:

\$ 7,300,000 (GO Virginia Multi-Region Competitive Fund)
3,700,000 (Matching Funds_\$1,604,000 local)

\$ 11,000,000 Total Project Budget

- A comprehensive project summary and the complete application will be sent to the Region 3 Council under separate cover.

RECOMMENDATION:

For the Region 3 Council's consideration and action.

PROGRAM DIRECTOR'S REPORT



DATE: January 15, 2026

TO: Region 3 Council

FROM: R. Bryan David, Program Director *RBD*

RE: GO Virginia Region Council Staffing Transition

In continuing to implement the staffing transition presented earlier this year to the Executive Committee and the Region 3 Council.

Ann Wright and I developed a Roles and Responsibilities document outlining our duties under this new staffing profile for the Region 3 Council. A draft was presented to the Executive Committee at its December 17th meeting.

As noted earlier, the transition plan involves reassigning duties and responsibilities among current staff members within the existing compensation budget.

The Executive Committee reviewed the draft document and agreed that it is thoughtfully designed and outlines how the roles and responsibilities will be shared between the Program Director (Ann Wright) and me (Project Coordinator) starting July 1st.

Attached is a copy of the draft document reviewed by the Executive Committee.

If it meets the approval of the Region 3 Council, this document, particularly as it relates to the Project Coordinator position, along with other supporting materials, will be presented to Laura Hennessy, Acting Director of the UVA Weldon Cooper Center for Public Service (WCCPS), for review and approval. Charles Hartgrove, Managing Director of the Virginia Institute of Government, has reviewed the document and will recommend that Laura approve it.

As the Region 3 Council Support Organization principal, Andy Wells, Executive Director of the Southside Planning District Commission, has been involved in developing the document and has indicated that he is comfortable with the division of roles and responsibilities as presented.

A budget is being developed to apportion shared funding for the Project Coordinator position between the Region 3 Council and the WCCPS. The shared funding formula, in place since June 2020, has the Region 3 Council funding 88% and the WCCPS funding 12% of the Program Director's total compensation. This results in the Region 3 Council funding \$113,902 and the WCCPS funding \$15,532 for the Program Director position in FY2025-2026.

As communicated throughout this transition process, the Region 3 Council will allocate \$113,903 for FY2026-2027 to fund the Program Director and Project Coordinator positions, reflecting the roles and responsibilities after July 1st.



Region 3 Council

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This draft budget, along with the draft WCCPS services agreement, will be presented to the Executive Committee for review and a recommendation in advance of the Region 3 Council's in-person meeting on April 15th. The WCCPS will have completed its review of the agreement and budget, and the results will be communicated to the Executive Committee for its consideration.

RECOMMENDATION:

For the Region 3 Executive Committee's information.



GO Virginia Region 3 Council 2026 Staffing Transition

Roles and Responsibilities Narrative for Program Director and Project Coordinator

I. Region 3 Program Director

[Engaged by the Southside Planning District Commission as the Support Organization.]

Role Summary

The Region 3 Program Director serves as the senior professional staff lead for GO Virginia Region 3 and is responsible for overall operational leadership, Council support, compliance, and stewardship. Engaged directly by the Southside Planning District Commission (SPDC) in its capacity as the Region 3 Council Support Organization, the Program Director provides leadership to the Region 3 Council and ensures alignment with GO Virginia statutory and policy requirements.

Key Responsibilities

Leadership and Council Support

- Serve as the principal professional advisor to the Region 3 Council and its standing and ad hoc committees.
- Lead implementation and periodic updates of the Region 3 Economic Growth and Diversification Plan.
- Advise the Council and its committees on regional priorities, funding strategies, and GO Virginia policies.
- Prepare and support Region 3 Council and committee meetings, including agendas, briefing materials, decision memoranda, and formal recommendations.
- Represent Region 3 in statewide GO Virginia meetings, DHCD briefings, chair/vice-chair calls, and State Board-related forums.

Project Oversight

- Support the Project Coordinator with managing the quality, balance, and advancement of the Region 3 project pipeline.
- In collaboration with the Project Coordinator, jointly evaluate and advance project concepts for Council and committee consideration.
- In collaboration with the Project Coordinator, guide the review and approval of all project applications prior to submission.
- Present project recommendations along with the Project Coordinator to the Region 3 Council and relevant committees for action.
- Serve as the primary programmatic liaison with DHCD throughout application review and State Board consideration.



Represent Region 3 Council to the GO Virginia State Board and the Department of Housing and Community Development

Compliance, Reporting, and Performance

- Ensure Region 3 compliance with GO Virginia guidelines, Council bylaws, FOIA, and COIA, in coordination with SPDC.
- Manage individual projects for financing, reporting, implementation, outcome tracking, close-out monitoring, and other related responsibilities.
- Contribute to the Council's annual report and other required deliverables.

Staff and Committee Coordination

- Work with the Project Coordinator to align work efforts and priorities.
- Coordinate and provide lead staff support to the Region 3 Council's standing and ad hoc committees, as needed, to advance project development and Council priorities.

II. Project Coordinator

[Current Program Director will continue employment with the UVA Weldon Cooper Center for Public Service under an updated two-year Services Agreement with the Region 3 Council.]

Role Summary

The Project Coordinator will support the Program Director and the GO Virginia Region 3 Council by providing end-to-end project and application development support, from initial concept identification through GO Virginia State Board approval. The role intends to leverage deep institutional knowledge, regional relationships, and prior strategic leadership experience to strengthen project quality, applicant readiness, and continuity. The Project Coordinator works collaboratively with and under the direction of the Program Director.

Key Responsibilities

Project and Application Development (End-to-End)

- Identify, cultivate, and refine project concepts aligned with Region 3 priorities and GO Virginia eligibility criteria.
- Engage existing and new regional stakeholders to develop viable project partnerships and project scopes of work.
- Support applicants throughout the whole application lifecycle, including project design, narrative development, budget formulation, and preparation of required attachments.
- Assist in responding to Virginia Department of Housing and Community Development requests for clarification and supplemental information during application review.
- Support preparation of materials and responses related to GO Virginia State Board consideration through final approval.

Council and Committee Support

- Provide staff support to the Region 3 Council and its standing and ad hoc committees for project-related matters in collaboration with the Program Director.
- Prepare background materials, project summaries, analyses, and briefing documents for Council and committee review.
- Participate in Council and committee meetings, as appropriate, to support project discussions and decision-making.

Stakeholder and Applicant Engagement

- Serve as a primary point of contact for applicants and project partners during application preparation.
- Provide applicants with hands-on guidance, mentoring, and technical assistance to improve project readiness and competitiveness.
- Facilitate coordination among multi-partner project teams from concept through approval.

Support and Continuity

- Provide strategic counsel to the Program Director and the Region 3 Council based on prior experience leading Region 3 programmatic efforts.
- Maintain institutional knowledge and historical context to support continuity and informed decision-making.
- Assist in maintaining a robust and forward-looking project pipeline.

Role Boundaries

- Operates in a support and advisory capacity and does not hold fiduciary authority, contractual authority, or final decision-making responsibility.
- Does not serve as the formal liaison with the Virginia Department of Housing and Community Development or represent the Region 3 Council in official State Board matters.

III. Collaborative Staffing Model and Budget Alignment

The Program Director and Project Coordinator serve as a *collaborative staff team*, providing coordinated support to the Region 3 Council and its standing and ad hoc committees. The Program Director retains final authority for Council support, compliance, and project advancement, while the Project Coordinator provides sustained, end-to-end project and application development support.

Compensation for both positions is supported entirely within existing budget resources and does not require additional funding outside the Region 3 Council's FY2025-2026 budget.





DATE: January 15, 2026

TO: Region 3 Council

FROM: R. Bryan David, Program Director

A handwritten signature in blue ink that reads "R. Bryan David".

RE: SOVA Innovation Hub – OpenAI Foundation People First AI Grant

The SOVA Innovation Hub recently received an announcement that its application for an unrestricted grant from the OpenAI Foundation was approved for \$60,000. The grant program was identified by Tad Deriso, President/CEO of Mid-Atlantic Broadband Communities Corporation, and the application was submitted by Lauren Mathena, Director of Economic Development & Community Engagement, and her team.

This grant will be built on a recent \$80,000 Microsoft TechSpark grant to help launch SOVA AI Connect. According to the SOVA Innovation Hub media release, "...this new community-based initiative will be designed by and for Southern Virginians, anchored at the SOVA Innovation Hub. SOVA AI Connect aligns with the mission of the SOVA Innovation Hub to spark economic transformation in Southern Virginia."

The OpenAI Foundation's media release and Microsoft's continued investment demonstrate that the SOVA Innovation Hub and its efforts to develop an entrepreneurship ecosystem are receiving well-earned national attention.

Attached are a feature article from Cardinal News and media releases from the OpenAI Foundation and the SOVA Innovation Hub.

RECOMMENDATION:

For the Region 3 Council's information. No action needed.

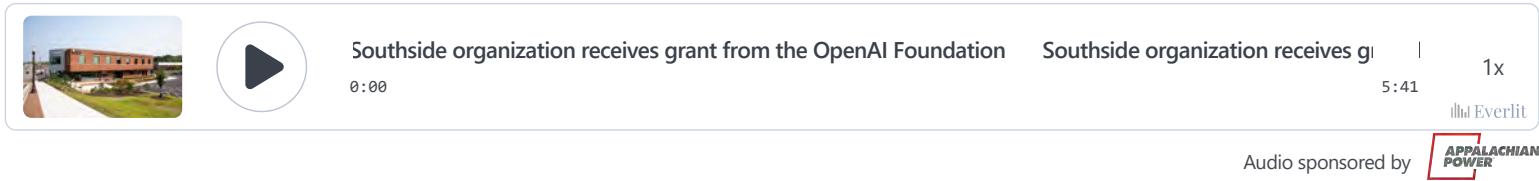
ECONOMY

Southside organization receives grant from the OpenAI Foundation

South Boston-based SOVA Innovation Hub is one of four organizations serving Virginia — and among 208 nationwide — to receive an award from the foundation linked to ChatGPT.

 by **Tad Dickens**
December 8, 2025

The SOVA Innovation Hub building in South Boston. Courtesy of Mid-Atlantic Broadband Communities Corp.



Southside organization receives grant from the OpenAI Foundation

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Audio sponsored by 

The nonprofit connected to artificial intelligence purveyor ChatGPT is giving \$60,000 to a Southside organization to build AI skills in the region.

The OpenAI Foundation last week announced the first recipients of its \$50 million People-First AI Fund, designed to help nonprofits strengthen their communities and expand AI opportunities. Among the 208 grant winners is the South Boston-based SOVA Innovation Hub.

The money is equal to 10% of the hub's \$600,000 annual operating budget, said Tad Deriso, president and CEO of Mid-Atlantic Broadband Communities Corp. The internet service provider, MBC for short, teamed with Microsoft to develop the SOVA Innovation Hub, which opened in 2021.

The hub houses meeting spaces, co-working spaces and the Microsoft Experience Center, which showcases technology germane to the Southside economy. Other SOVA Innovation Hub programs include Evolve, which helps nonprofits improve their efficiency, and RISE, short for Regional Investment in Startups and Entrepreneurs, said Liz Smith, marketing manager for MBC and an innovation hub team member.

Organizers will use the OpenAI grant to found SOVA AI Connect to help "rural residents, small businesses, schools, farms and nonprofits build practical AI skills through workshops, demonstrations, civic innovation challenges, and job-skills training," according to a news release.

SOVA AI Connect will be an extension of MBC's original mission. The nonprofit ISP was founded in 2004 to use money from the Virginia Tobacco Commission and the U.S. Department of Commerce's Economic Development Administration for broadband deployment.

"I think it's really interesting when you look at the infrastructure we've put together, kind of building the digital highway to make these things happen," said Deriso, who was MBC's first employee. "And one of our mantras early on and our guiding principle has always been, level the playing field. ... There shouldn't be a rural penalty to have broadband. It's just insane."

AI presents yet another opportunity for rural Southside, Deriso said.

"It's this new technology, and if you look at media, sometimes it's like, Oh, it's going to take our jobs or it's the end of the world or whatever. But there's a lot of good that can come out of that. And we want to be the ones that say, hey, we're a trusted partner, we're a trusted voice in the region.

"Let us be able to train you. Let's talk about the ways to use it responsibly, creatively. What are some ways that we can just help people kind of get over the fear factor and actually start to use it?"

The first program will be Generative AI for Business Impact, in tandem with Microsoft and accelerator company gener8tor — the latter having shepherded multiple SOVA hub cohorts through project management, data analytics, IT and other training tracks.

Deriso discovered the grant opportunity earlier this year on a business trip to California. AI was among the topics, and a meeting participant joked, "OpenAI is a nonprofit. You guys are a nonprofit. Why aren't you all worth billions of dollars?"

It sparked a laugh and curiosity, Deriso said. He began surfing the OpenAI website, focusing on its nonprofit arm, and discovered a post touting the People-First AI Fund. In September, an MBC team put together an application "with a little help from Chat GPT," making the Oct. 8 deadline, Deriso said. Then came the Wednesday announcement.

"Fastest grant thing I've ever seen in my life," he said of the small application window and quick turnaround time.

The foundation distributed \$40.5 million and will release \$9.5 million more in the coming months, according to the OpenAI news release.

[The announcement's recipient list](#) includes one other organization — Arlington-based Educacion Para Nuestro Futuro Founded By Escuela Bolivia — located solely in Virginia. Several other entities, such as the Rural Opportunity Institute, the Center for Common Ground, the News Literacy Project and the Martin Luther King Jr. Center for Nonviolent Social Change and Veterans for All Voters, include Virginia among the states they serve.

Deriso said he believes it is the beginning of a relationship with the foundation.

"People love investing in successes, and that's why I think Microsoft is here," he said. "People invest in Southern Virginia because they see good things coming out of it. And I think this is just the first of many opportunities we have to work together and if anything, just getting visibility into rural Virginia and what OpenAI is helping to do, that's a pretty big deal, we think."



Tad Deriso, Courtesy of Mid-Atlantic Broadband Communities Corp.

For Business

API Platform for Developers

ChatGPT

Sora

Stories

Company

News

December 3, 2025 Company Global Affairs

Announcing the initial People-First AI Fund grantees

Unrestricted funding for 208 nonprofits advancing people-first work nationwide.

▶ Listen to article 8:43

🔗 Share

The OpenAI Foundation is announcing the first recipients from the [People-First AI Fund](#), a multi-million dollar investment in community-based nonprofits working to strengthen local communities and expand the opportunity of AI.

Through an open call, the Foundation will provide \$40.5 million in unrestricted grants to 208 nonprofits across the United States. Funds will be disbursed by the end of the year. A second wave of \$9.5 million in Board-directed grants will be announced in the coming months, supporting organizations already advancing transformative AI work in areas like health that reflect the Fund's people-first values and potential for broad public benefit.

*“The People-First AI Fund reflects our commitment to supporting a wide range of organizations advancing work that strengthens communities and expands opportunity. We’re proud to support this first group of grantees and to continue work that is mission-driven and responsive to the people it exists to serve.” —**Bret Taylor, Chair of the OpenAI Foundation Board***

The OpenAI Foundation looks forward to learning alongside these organizations and local leaders, sharing insights, and expanding our grantmaking work.

[See below for full list.](#)

The open call selection process

for these grants: the work of our independent nonprofit Commission, nationwide community listening, the Commission's public report, and the launch of the People-First AI Fund.

The application window for the first wave of grants—all unrestricted—was open from September 8 through October 8 and featured a short, four-question application. Nearly 3,000 organizations applied from across the country—an indication of both the demand for support and desire among community-based organizations to help shape how AI can be applied to their work and the people they serve.

Daniel Zingale, who had served as convener of the Nonprofit Commission, supported the Foundation in translating the Commission's recommendations into the Fund's implementation. Together with external grantmaking experts, advisors, and members of the Nonprofit Commission, the group conducted a multi-step, independent human review and screening process. Every application was reviewed, with shortlisted recommendations advanced to the OpenAI Foundation Board for final consideration.

This cohort includes organizations that are mission-driven, community-centered, and ready to move. Many have never used AI or are early in their exploration, reflecting the Fund's goal of supporting trusted local organizations at the front lines of community impact. California nonprofits are well represented, consistent with our commitment to our home state.

Ask ChatGPT

A nationwide portfolio

The organizations announced today serve people and communities in every region of the United States, across both rural and urban areas. The portfolio includes national networks advancing news literacy and veteran support, youth-led innovation in the Midwest, faith-based networks in the South, rural capacity-building organizations in California's Central Valley, Native-led media and STEM education programs in the Southwest.

Examples are highlighted below:

- **Digital NEST (CA):** A workforce development nonprofit helping youth in agricultural communities thrive in today's digital economy through career

- **Be Loud Studios (LA)**: Amplifies the voices of young people through radio and digital media and is exploring how to elevate youth perspectives in conversations around AI and mental health.
- **Delaware Alliance for Nonprofit Advancement (DE)**: Champions Delaware's nonprofit sector by providing tools, knowledge, and connections that nonprofits need to strengthen their organizations and expand their impact.
- **Valley Initiative for Development and Advancement (TX)**: Empowers underserved, low-income students and working adults to achieve economic mobility through comprehensive case management, wrap-around financial assistance, career navigation, and strong employer partnerships. VIDA is expanding access to AI and technology training programs to equip communities with the skills needed to thrive in the future workforce.
- **Rural Opportunity Institute (NC)**: Builds the capacity of rural communities to support youth well-being, including helping school districts use existing public funding to expand on-site mental health services.
- **Springboard to Opportunities (MS)**: Supports residents of federally subsidized housing as they pursue their goals in school, work, and life. Created the first and longest-running guaranteed income initiative in the United States and is now exploring how AI impacts the communities they serve.
- **Arc of Madison County (AL)**: Serves individuals with intellectual and developmental disabilities, and their families, and is exploring how AI can support specialized education and career pathways for neurodivergent learners.
- **Healthy Archuleta (CO)**: Works to improve food and healthcare systems in a rural community to strengthen access, equity, and community wellbeing, strategically capturing learning that can be shared with other rural communities. The organization is exploring how AI can strengthen initiatives like the Community Food Hub, which connects local food producers, consumers, and entrepreneurs through a centrally located food hall.
- **Camai Community Health Center (AK)**: Federally Qualified Health Center exploring how AI can improve primary care and community health services for remote Alaskan communities.

Education Departments and is running AI literacy programs to help strengthen tribal sovereignty.

- **3 Dots Downtown (PA)**: Local arts and community center exploring workshops and programs around AI literacy, art, and professional development.
- **Warriors & Quiet Waters Foundation (MT)**: Helps post-9/11 combat veterans rediscover purpose, connection, and healing through transformative, nature-based experiences.
- **Ephrata Public Library (PA)**: Independent, nonprofit public library that offers digital literacy and workforce development programs.
- **STEM From Dance (CA, FL, IL, MA, NY, NC, TX)**: Partners with schools, community centers, and youth-serving organizations to combine dance and AI learning for young girls of color.
- **Amigos Together for Kids (FL)**: A Miami nonprofit dedicated to preventing child abuse and neglect by empowering parents, supporting families in crisis, and providing safe, enriching after-school and summer programming for children.
- **Maui Roots Reborn (HI)**: Multicultural disaster response and justice organization that provides legal, financial, and social support to Maui's immigrant and migrant community.
- **SOVA Innovation Hub (VA)**: Provides coworking space, training, and events that bring together entrepreneurs, educators, students, and nonprofit leaders to build digital skills and drive economic transformation in Southern Virginia.
- **Native American Journalists Association (AZ, CA, KS, MN, MT, NM, NY, ND, OK, OR, WY)**: Advances the voices of Indigenous peoples in the media, which guides how they engage with emerging technologies like AI.

About the People-First Fund

The People-First AI Fund backs work in areas that communities told us matter most, with flexible, unrestricted funding to address immediate needs:

- **AI literacy and public understanding.** Programs that build knowledge, skills, and confidence so people—especially trusted local leaders like teachers, faith leaders, and youth mentors—can engage with AI in ways that matter for their lives.

improving access to essential services, and supporting well-being in place-based settings such as schools, libraries, clinics, and community centers.

- **Economic opportunity.** Programs that expand access to meaningful, fairly distributed work as AI changes the labor landscape, including training for the jobs of the future, cooperative and shared-value models, and support for caregivers and local businesses.
- **Transformative grants.** A Board-directed second wave of grants will support organizations already advancing transformative AI work across areas like health, and will prioritize projects with the potential to scale and create durable public benefit.

Thank you to the community leaders who helped shape this Fund. We're committed to learning side-by-side with grantees, sharing insights, and continuing to support efforts that improve people's lives.

We're just getting started.

—The OpenAI Foundation Board

People-First AI Fund: Award List

3 Dots Downtown (PA)

3Strands Global Foundation (CA)

AccesSOS (CA, NM)

African American Community Service Agency (CA)

Afro-American Cultural Center, Inc. (NC)

All Star Code Inc. (CA, IL, NJ, NY, PA, TX)

Alliance For A Better Community (CA)

Amigos Together For Kids, Inc. (FL)

Arc of Madison County Inc (AL)

Bainbridge Youth Services (WA)

Bay Area Video Coalition, Inc. (CA)

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Better Youth, Inc. (CA)

Sora

Big Brothers Big Sisters of Idaho (ID)

Stories

Black Girls Do Engineer Corporation (NY, TX)

Company

Boston Project Ministries Inc (MA)

News

Boys and Girls Club of Fontana (CA)

Boys and Girls Clubs of Chaves and Lincoln Counties (NM)

Bridge Builders Foundation Inc (CA)

California Association of African American Superintendents And Admin (CA)

California Black Womens Collective Empowerment Institute (CA)

California Rural Legal Assistance Foundation Inc. (CA)

Camai Community Health Center, Inc (AK)

Capital B News, Inc. (GA, IN)

Capitalists For Shared Income (CA, ME, NJ, OH, PA)

Center for Asian Americans United For Self-Empowerment, Inc (CA)

Center for Common Ground (AL, GA, NY, NC, SC, VA)

Central Valley Immigrant Integration Collaborative (CA)

Charity Cultural Services Center (CA)

Chicano Awareness Center Inc (NE)

Childrens Museum Inc (PA)

Chinese Culture Foundation of San Francisco (CA)

Citizens 4 Community, Inc. (OR)

City Heights Community Development Corporation (CA)

Code Girls United (MT)

College Dreams (OR)

College of Adaptive Arts (CA)

Commonwealth Prevention Alliance (PA)

Commún Denver Inc. (CO)

Community Interventions (CA)

Comunidades Organizando El Poder Y La Accion Latina Copal Education (MN)

Creative Girls Rock (TN)

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Culturesource (MI)

Defend Our Health (ME, MA, MI, PA, SC)

Delaware Alliance For Nonprofit Advancement (DE)

Dent Education (MD)

Diakonia (CO)

Dibia Dream Inc (FL, GA, LA, TN)

Digital Democracy Institute of The Americas (CA, DC, FL, NV, NM, TX)

Digital Justice Lab (CA)

Digital NEST Inc (CA)

Divine Truth Unity Fellowship Church Dba Rainbow Pride Youth Alliance (CA)

DJM Community Outreach (IL)

Dolores Huerta Foundation (CA)

Donaldina Cameron House (CA)

Dottie Rose Foundation (NC)

DreamYard Project Inc (NY)

East Harris County Empowerment Council (TX)

Educacion Para Nuestro Futuro Founded By Escuela Bolivia (VA)

El Rescate (CA)

El Sol Neighborhood Educational Center (CA)

Ella Baker Institute Inc (NY)

Emerald South Economic Development Collaborative (IL)

Ephrata Public Library (PA)

Eradicate Hate Global Summit (CA, MA, PA, HI, IL, NY, TX, CO, DC)

Esq Apprentice (CA)

F.Y. Eye, Inc. (NY)

Fabnewport (RI)

Family Alliance For Counseling Tools & Resolution (CA)

First Congregational Church Westfield Nj (NJ)

Foot Soldiers Park (AL)

Franklin Food Bank (NJ)

| | |
|--|---|
| | Grace-Mar Services Inc (NC) |
| | Groundswell Community Mural Project Inc (NY) |
| | Gryphon Place (MI) |
| | Healthy Archuleta Inc (CO) |
| | Heartland Forward, Inc (AL, AR, IL, IN, IA, KS, KY, LA, MI, MN, MS, MO, NE, ND, OH, OK, SD, TN, TX) |
| | Hispanas Organized For Political Equality-California (CA) |
| | Hispanic Center of Western Michigan Inc (MI) |
| | Hollywood 4Wrd (CA) |
| | Homeboy Art Academy Inc (CA) |
| | If Project (WA) |
| | Illinois Philharmonic Orchestra (IL) |
| | Income Movement Foundation (CA, CO) |
| | Income to Support All Foundation (MA, CA, DC, NY) |
| | Ink People Inc (CA) |
| | Interfaith Community Housing of Delaware, Inc. (DE) |
| | International Examiner (WA) |
| | Iola Foundation (CA, FL, GA, IL, MA, NY, NC, PA, TX, WA) |
| | J Herman Bosler Memorial Library Bosler Free Library (PA) |
| | Just Harvest Education Fund (PA) |
| | Keshet Dance Company (NM) |
| | Kidznotes (NC) |
| | Kultivate Labs (CA) |
| | La Cocina (CO) |
| | Laborers' Community Service And Training Foundation (CA) |
| | Legal Aid Society of San Bernardino (CA) |
| | Liberated Success, Inc. (NY) |
| | Lights Camera Discover (AZ, FL, IL) |
| | Little Brothers-Friends of The Elderly (MA) |
| | Loaves, Fishes, & Computers, Inc. (CA) |
| | Long Beach Journalism Initiative Inc (CA) |

| | |
|--|--|
| | Make A Day Foundation (OH) |
| | Make Projects (CA) |
| | Maui Roots Reborn (HI) |
| | Mckinleyville Community Collaborative (CA) |
| | Media Arts Center San Diego (CA) |
| | Merge Opportunities Inc (CA) |
| | Merrick Community Services (MN) |
| | Midtown Utica Community Center (NY) |
| | Mile High Ministries (CO, MO, NM) |
| | Milpa (CA) |
| | Ministries of Grace, Inc. - Ga (GA) |
| | Mockingbird Society (WA) |
| | Mongabayorg Corporation (CA) |
| | Moveius Contemporary Ballet Dba Dance Loft On 14 (DC) |
| | Muralism (CA) |
| | National Crime Victim Law Institute (AZ, CA, CO, IL, NM, OH, OR, SC, NH) |
| | National Institute for Workers' Rights (CA, DC) |
| | Native American Journalists Association (AZ, CA, KS, MN, MT, NM, NY, ND, OK, OR, WY) |
| | Navigate the Maze to Achievement (NY) |
| | Neighbor to Neighbor Ministries (NC) |
| | Neutral Zone (MI) |
| | Northern California Educational Television Assn, Inc. (CA) |
| | Northern Nevada Literacy Council (NV) |
| | NYTAG Inc (NY) |
| | One Media (OR) |
| | Only7Seconds (WA) |
| | Openhouse (CA) |
| | Oregon Entrepreneurs Forum (OR, WA) |
| | PawsWithCause (WA) |
| | PICO California (CA) |

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PRO Youth and Families, Inc. (CA)

Program for Female Offenders of South Central Pennsylvania Inc (PA)

Progress for Good Inc (NY)

Project Equity (CA)

Public Health Advocates (CA)

Public Housing Community Fund (NY)

Radio Bilingue, Inc. (AZ, CA, CO, NM, OR, TX)

Reach Out West End Inc (CA)

Ready to Succeed (CA)

Reality Changers (CA)

Red Hook Art Project, Inc. (NY)

Restore Hope Inc (AR, IA, MI)

Rural Opportunity Institute (GA, NC, SC, TN, VA)

Sacramento Youth Center (CA)

Safe Harbor Coronado (CA)

Safe Organized Spaces Richmond (CA)

Library Foundation SD (CA)

San Francisco Information Clearinghouse (CA)

San Francisco Women's Centers (CA)

Seal Future Foundation (CA, FL, NY, TN, TX, VA)

Service to School (CA, FL, GA, IL, MA, NY, NC, TX, VA, WA)

Sigma Beta Xi, Inc. (CA)

Sikh American Legal Defense And Education Fund (AZ, CA, CO, CT, DE, DC, FL, GA, IL, IN, KS, KY, MD, MA, MI, MN, MS, NV, NJ, NM, NY, NC, OH, OR, PA, SC, TN, TX, UT, VA, WA, WI)

Silence the Shame, Inc. (GA)

Siskiyou County Job Council (CA)

Social Creatures Inc (NY)

Social Enterprise Greenhouse (RI)

Social Justice Learning Institute Inc (CA)

South End Community Outreach Ministry (MI)

Spanish Speaking Citizens Foundation (CA)

Springboard to Opportunities (MS)

St Ann's Warehouse Inc (NY)

STEM From Dance, Inc. (CA, FL, IL, MA, NY, NC, TX)

STEMarts Lab (NM)

Suicide Prevention Coalition of Eagle Valley (CO)

The Forbes Funds (PA)

The Giving Kitchen Initiative, Inc (GA, NC, TN)

The Kelsey (AL, CA, CO, GA, KY, MA, MI, OH, RI, TN, TX, WY)

The Knowledge House Fellowship Inc (CA, CT, GA, NJ, NY)

The Lighthouse Black Girl Project (MS)

The Lunar Foundation (TX)

The Martin Luther King Jr Center for Nonviolent Social Change (AL, AK, AZ, AR, CA, CO, CT, DE, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY)

The National Federation for Just Communities of Western New York (NY)

The News Literacy Project (AL, AK, AZ, AR, CA, CO, CT, DE, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY)

The Source LGBT+ Center (CA)

The Stories of Us, Inc (CA, DC, GA, IL, LA, MI, NY, OH, PA)

The Synod of The Covenant Presbyterian Church Usa (IN, KY, MI, OH, WI)

Theatresquared (AR)

Three Rivers Young Peoples Orchestras (PA)

Tomorrows Leaders NYC (NY)

Transgender District Company (CA)

Tribal Education Departments National Assembly (OK)

Two River Times Foundation (NJ)

Upsolve Inc (AK, AZ, AR, CA, CO, CT, DE, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, WA, WV, WI, WY)

Urgent, Inc. (FL)

Valley Initiative For Development And Advancement (TX)

For Business

API Platform
For Developers

ChatGPT

Sora

Stories

Company

News

Veggielution (CA)

Veterans For All Voters (AL, AK, AZ, AR, CA, CO, CT, DE, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VT, VA, WA, WV, WI, WY)

Voices of Pacific Island Nations (WA)

Warriors & Quiet Waters Foundation (MT)

Welcoming Center For New Pennsylvanians (PA)

Women of Color On the Move (CA, NC)

Women on The Rise GA (GA)

Women's Economic Self-Sufficiency Team Corp (NM)

Worcester Youth Center, Inc. (MA)

Youth 2 Leaders Education Foundation (CA)

Youth Action Programs And Homes Inc (NY)

Youth Law Center (CA)

YouthBeat (CA)

YWCA Greater Pittsburgh (PA)

Community 2025

Author

OpenAI

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Introducing SOVA AI Connect

by SOVA Innovation Hub | Dec 3, 2025 | Blog, Digital Skills, Innovation & Entrepreneurship, Nonprofit Resources, small business support, SOVA Innovation Hub News, Technology



Building Southern Virginia's Future Through Community-Driven AI Innovation

The SOVA Innovation Hub is proud to announce that it has been awarded an [OpenAI Foundation People-First AI Grant](#). The SOVA Innovation Hub was one of 208 nonprofits nationwide, and one of only four in Virginia, chosen from more than 3,000 applicants. This award underscores both the strength of Southern Virginia's innovation-driven vision and the meaningful work already underway to advance that vision.

With this support, the SOVA Innovation Hub will launch **SOVA AI Connect** in 2026. This new community-based initiative will be designed by and for Southern Virginians anchored at the SOVA Innovation Hub. SOVA AI Connect aligns with the mission of the SOVA innovation Hub to spark economic transformation in Southern Virginia.

SOVA AI Connect will help people build AI literacy, confidence, and practical skills through hands-on workshops and demonstrations, civic innovation challenges, and workforce training. The initiative will help people apply AI responsibly and creatively to strengthen local industries, improve services, and solve community challenges. This project will deepen the SOVA Innovation Hub's ability to support community innovation and workforce development.

The SOVA Innovation Hub was created in a partnership between Mid-Atlantic Broadband Communities Corporation (MBC) and Microsoft TechSpark to inspire people to pursue entrepreneurship and develop digital skills. Through coworking, hands-on training, [signature programs](#) like RISE, EXCITE, and EVOLVE, and regional community outreach, the SOVA Innovation Hub brings together entrepreneurs, educators, students, and non-profit leaders to learn, collaborate, and grow.

MBC has spent over two decades expanding broadband infrastructure and economic opportunity across Southern Virginia. Through the SOVA Innovation Hub, MBC supports programs that build digital skills, support entrepreneurship, and ensure that rural communities have access to the tools they need to thrive in a modern economy.

"MBC invests in the SOVA Innovation Hub because we believe every community in Southern Virginia deserves the chance to participate fully in the digital economy," said Tad Deriso, President & CEO, Mid-Atlantic Broadband Communities Corporation. "This recognition from the OpenAI Foundation affirms the impact of that work and the potential of the people who call this region home. SOVA AI Connect will help residents build trust, skills, and confidence with AI—ensuring that emerging technology benefits our farms, schools, small businesses, and nonprofits in practical, meaningful ways."

We look forward to launching SOVA AI Connect in partnership with the OpenAI Foundation and continuing to expand innovation capacity across Southern Virginia.

To receive updates and announcements about SOVA AI Connect, please join the [SOVA Innovation Hub newsletter](#) and follow the SOVA Innovation Hub on [Facebook](#), [Instagram](#), and [LinkedIn](#).



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DATE: January 15, 2026

TO: Region 3 Council

FROM: R. Bryan David, Program Director

A handwritten signature in blue ink that reads "R. Bryan David".

RE: Institute for Advanced Learning and Research 2025 Annual Report

Each year, the Institute for Advanced Learning and Research prepares a report highlighting its accomplishments in its areas of focus, which include applied research, advanced learning, economic development, manufacturing advancement, and conference services.

Attached is the 2025 report titled "A Regional and National Catalyst."

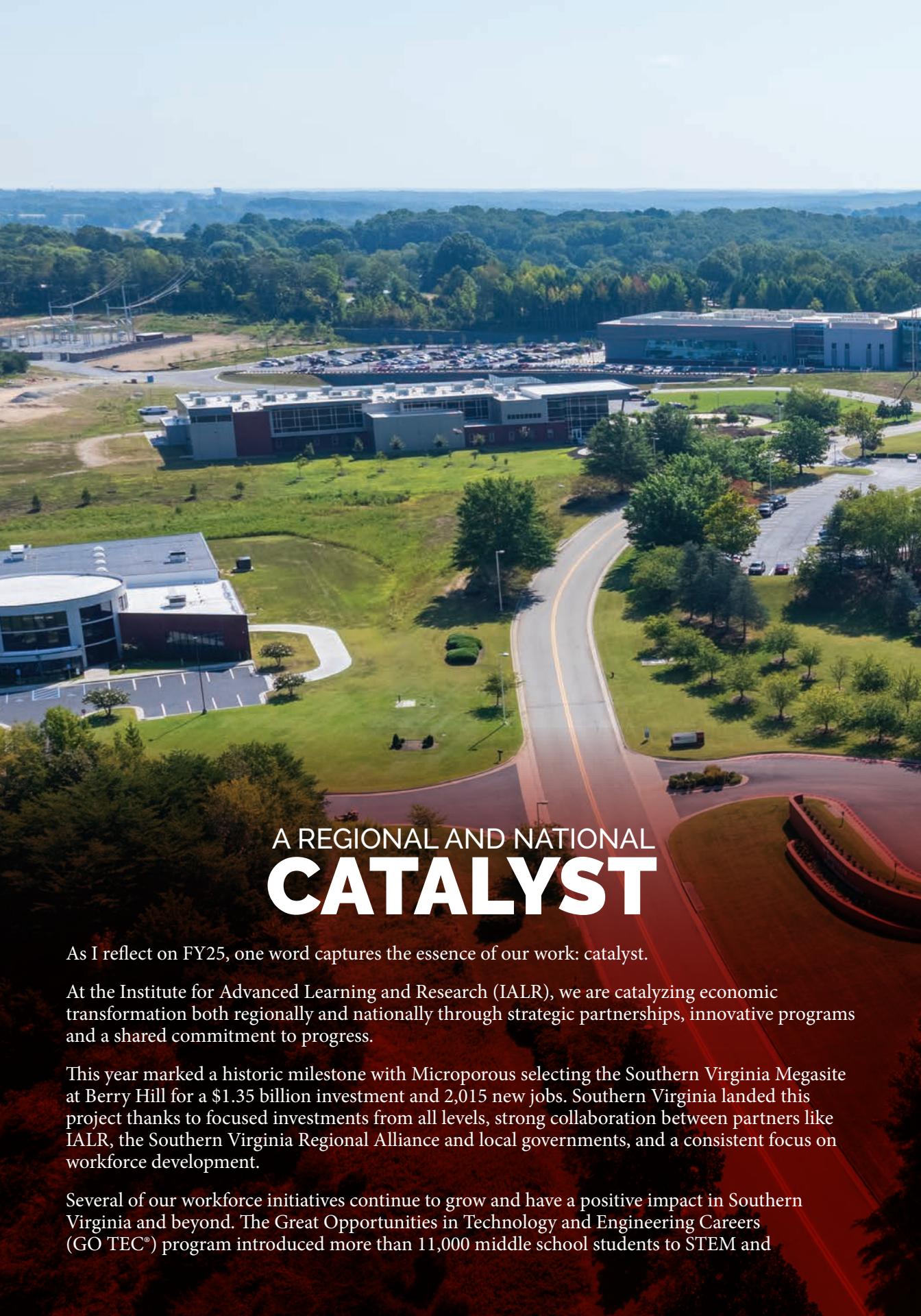
RECOMMENDATION:

For the Region 3 Council's information. No action needed.



A REGIONAL AND NATIONAL
CATALYST

**2025 ANNUAL
REPORT**



A REGIONAL AND NATIONAL **CATALYST**

As I reflect on FY25, one word captures the essence of our work: catalyst.

At the Institute for Advanced Learning and Research (IALR), we are catalyzing economic transformation both regionally and nationally through strategic partnerships, innovative programs and a shared commitment to progress.

This year marked a historic milestone with Microporous selecting the Southern Virginia Megasite at Berry Hill for a \$1.35 billion investment and 2,015 new jobs. Southern Virginia landed this project thanks to focused investments from all levels, strong collaboration between partners like IALR, the Southern Virginia Regional Alliance and local governments, and a consistent focus on workforce development.

Several of our workforce initiatives continue to grow and have a positive impact in Southern Virginia and beyond. The Great Opportunities in Technology and Engineering Careers (GO TEC®) program introduced more than 11,000 middle school students to STEM and

The Institute for Advanced Learning and Research serves as a regional catalyst for economic transformation. The mission will be accomplished through applied research, advanced learning, economic development, manufacturing advancement and conference services.

While IALR's primary service region is Southern Virginia, a number of programs serve much of the Commonwealth and the nation.



advanced manufacturing careers, building a talent pipeline that strengthens Virginia's business competitiveness. Nationally, the Accelerated Training in Defense Manufacturing (ATDM) program opened its new Maritime Training Center and has graduated nearly 1,000 students from almost every state, supporting the U.S. Navy and defense industrial base with skilled labor.

Across programs and focus areas, innovation remains at the heart of our mission. The Center for Manufacturing Advancement achieved International Organization for Standardization (ISO) certification and continues a strong partnership with the Navy's Additive Manufacturing Center of Excellence to deliver solutions that keep naval vessels mission ready. Our Applied Research team continues to advance global industries through partnerships and services that meet the needs of industry.

Beyond programs, our campus served as a hub for success, hosting more than 33,000 event attendees and housing more than 20 businesses and organizations committed to education, innovation and economic growth.

On behalf of our Board of Trustees, thank you to our partners and stakeholders for making these achievements possible. As we look ahead, IALR will continue to serve as a catalyst for Southern Virginia, the Commonwealth and the nation.

Telly D. Tucker, President | IALR



The coordinated efforts among IALR, the Southern Virginia Regional Alliance of IALR and local governments were key in attracting this transformative project to the region.



“The workforce development and recruitment support were the key differentiator that led to Microporous’ decision to choose Virginia over other competing states.”

Brad Reed, Vice President, Corporate Development,
Microporous LLC

A TRANSFORMATIVE INVESTMENT IN SOUTHERN VIRGINIA

Culminating 20 years of strategic planning and measured investments, the Southern Virginia Megasite at Berry Hill officially landed Microporous as its anchor company. This project will create thousands of direct jobs and will have a transformational impact on Southern Virginia.

2,015
Jobs

\$1.35
Billion Capital
Investment



VIRGINIA MIDDLE SCHOOLERS EXPERIENCE CAREER OPPORTUNITIES

“The effectiveness of the GO TEC program – and how it funnels directly into a variety of other strong, proven workforce training programs – is a primary selling point for Southern Virginia.”

Linda Green, Vice President, Economic Development, IALR;
Executive Director, SVRA

The GO TEC logo is prominently displayed in the center of the image. The letters 'GO' are in a dark green color, while 'TEC' is in a bright yellow color. The letters are outlined with a white glow, and the entire logo is set against a dark, slightly blurred background of what appears to be a classroom or workshop setting.

More school divisions are choosing to adopt the program, which has two primary benefits:

- **Middle school students discover available career pathways and opportunities**
- **Regional businesses (as well as prospective future businesses) see their future talent pipeline**

The Great Opportunities in Technology and Engineering Careers (GO TEC®) program gives Virginia middle schoolers hands-on introductions to STEM and manufacturing career paths and opportunities.





200+
participating
employers

**Students from
46 states
and employed in
39 states**

**85–90%
employment
placement rate**

**Nearly
1,000
graduates as of
June 30, 2025**

“ATDM is a great model for us.”

Admiral James W. Kilby, Vice Chief of Naval Operations, U.S. Navy

GROWING THE NATIONAL MANUFACTURING WORKFORCE

The Accelerated Training in Defense Manufacturing (ATDM) program prepares adult learners for manufacturing careers that support the maritime industrial base (MIB) – the system of companies that produce parts and equipment for the U.S. military.

The new ATDM Maritime Training Center opened on the IALR campus in January 2025, which is allowing the program to continue to scale.

Training happens across five different program areas:

WELDING

CNC MACHINING

ADDITIVE MANUFACTURING

NON-DESTRUCTIVE TESTING (NDT)

QUALITY CONTROL INSPECTION (METROLOGY)



“ATDM is a game-changer and an opportunity for us to decrease our time to talent.”

Bobby Russell, BWX Technologies

A HUB FOR MANUFACTURING OPTIMIZATION SERVICES

The Center for Manufacturing Advancement (CMA) allows manufacturers to enhance processes and deploy manufacturing solutions and technologies with maximum return and minimum investment. Industry partners benefit from consulting and project optimization services, including process optimization, precision machining, digital transformation and operational excellence.

The CMA achieved the prestigious ISO 9001:2015 certification for the CNC Machining Innovation Lab and the fully equipped Metrology Lab.



HOME OF U.S. NAVY INNOVATION

*“The work that we do at the AM CoE
is transferable to the supply base.”*

Ereina Avery, Austal USA

Housed inside the CMA through a public-private consortium, the U.S. Navy's Additive Manufacturing Center of Excellence (AM CoE) is leveraging IALR's world-class machining capabilities — including advanced 5-axis machining — to transform additive-manufactured metal alloy parts into mission-ready components. By creating technical data packages, or “manufacturing recipes,” the AM CoE activates suppliers across the maritime industrial base (MIB) and accelerates production of critical sustainment parts. These efforts enable faster repairs of ships and submarines and generate significant savings through optimized inventory management.

Below: The CNC Machining Innovation Lab provides optimization services and supports the work of the AM CoE.





**21,036
AmeriCorps
Service Hours**



**16,500+
Total STEM-H
participants**

LEARNING THAT CREATES ECONOMIC OPPORTUNITY

IALR's Advanced Learning team provided a range of programming, business support services and opportunities to further three primary goals:

- Expand STEM Capacity**
- Connect Students to Careers**
- Better the Community with Service and Lifelong Learning**



**4,546
participants in
Career ChoICE
Youth Expo**



**65
Interns Placed**



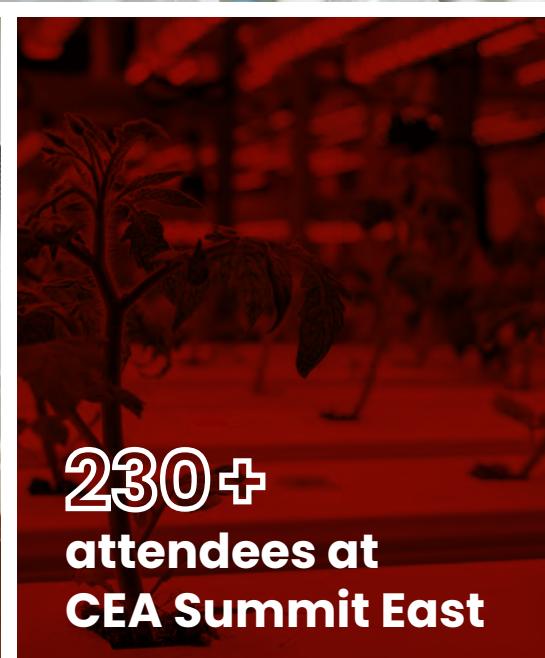
Above: REACH made strides toward a systems approach to community health, providing education and connection services to 664 clients.

“We see STEM education, service learning and work-based learning as foundational pillars of economic transformation.”

John H. Hughes, IV, Ed.D., Executive Vice President, Operations, IALR

Below: The Expanding Talent through Registered Apprenticeship (ExTRA) program helped dozens of companies with technical assistance, grant funding and registered 55 new apprentices.





“We tailor every service and partnership to strengthen local companies and support industry and academia around the world.”

Scott Lowman, Ph.D., Vice President, Applied Research, IALR

RESEARCH SERVICES AND PARTNERSHIPS TO **GROW GLOBAL INDUSTRY**



IALR's Applied Research work connects academia, industry and the public and private sectors through

**INNOVATIVE RESEARCH
COLLABORATIVE PARTNERSHIPS
RELIABLE TESTING AND SERVICES**

Our combined expertise in life sciences and technology allows us to move industries forward by supporting and collaborating with organizations and companies of all sizes worldwide.

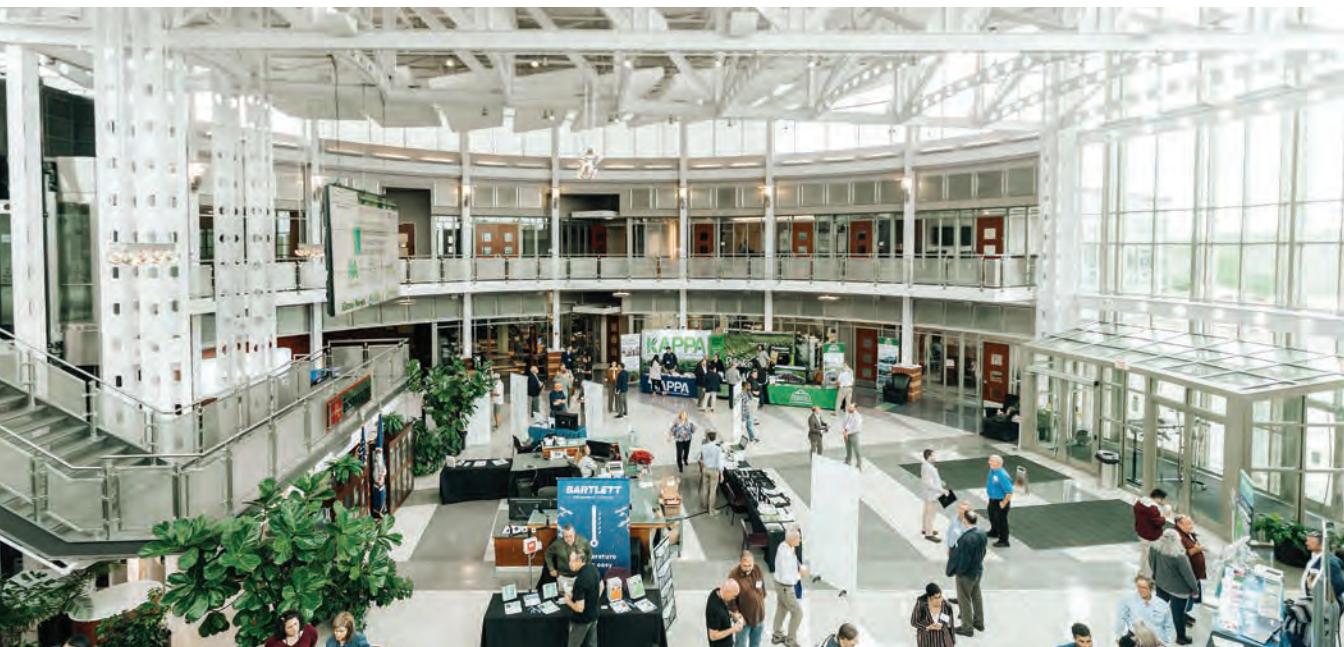
Through a partnership with Virginia Tech, the Controlled Environment Agriculture (CEA) Innovation Center continues to support the growth of the CEA industry in Virginia and beyond by researching growing best practices, facilitating strategy development, fostering collaboration and serving as a training ground for students and future researchers.

“IALR provides us with great, affordable research services. Working with IALR has increased our capability to test our products.”

Jiarui Li, CEO, Innatrix

A PLACE FOR MUTUAL SUCCESS

The IALR Conference Center hosted hundreds of successful, impactful events in FY 25. These included small to large meetings, trainings and seminars, corporate retreats and multi-day conferences with hundreds of attendees.



“IALR is a staple in our community. It has all of the glam and glitz to enhance any event.”

Felecia “Cookie” Edmunds



The IALR campus is a hub for various organizations, including legacy educational organizations, entrepreneurs launching new businesses, large national corporations, companies developing a permanent facility in the region and economic development organizations.



“At IALR, the facilities and people are superb.”

Chris Lester, Ph.D., Owner, Lester Polymer Insights LLC

"As we close another year of progress, it's clear that IALR is serving as a true catalyst for growth both regionally and nationally. The board remains committed to ensuring that every investment drives meaningful impact for our communities and beyond."

Donald W. Merricks, Board Chair | IALR



IALR celebrated several anniversaries in the past year.

IALR's first main building, 150 Slayton Avenue, opened 20 years ago. This iconic building continues serving clients and hosting events that benefit Southern Virginia and beyond.



The Integrated Machining Technology program completed its 10th cohort. A collaboration with Danville Community College, this program has trained 160 graduates and has a 100% job placement rate.



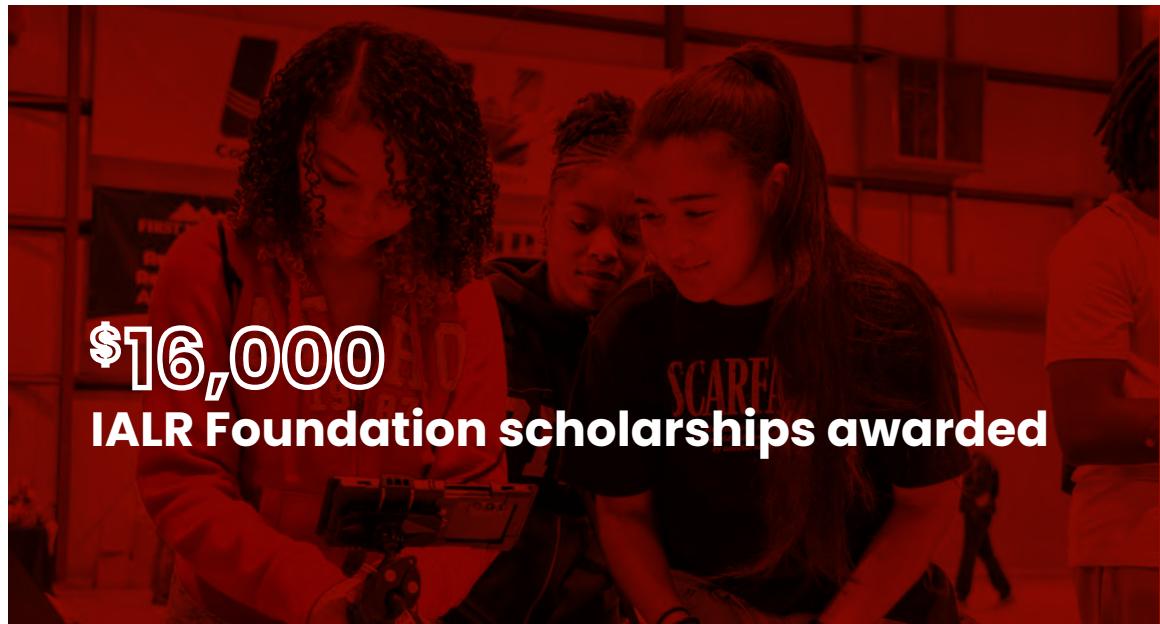
The Dan River Year AmeriCorps program completed its 10th year. This unique service opportunity continues to evolve to meet community needs, ranging from STEM and literacy support for students to community health education.

FY 25 Economic Development Achievements:

2,285 New Jobs Announced

\$1.4 Billion Capital Investments Announced

BY THE NUMBERS



**\$16,000
IALR Foundation scholarships awarded**

The Foundation makes strategic investments in scholarships, workforce programs and other opportunities, all with the goal of strengthening Southern Virginia's future."

Leslie Mantiply, President | IALR Foundation Board

| IALR FINANCIALS | 2025 | 2024 |
|---|----------------|----------------|
| Total Operating Revenues | \$30,484,373 | \$8,689,059 |
| Total Operating Expenses | \$43,182,471 | \$24,541,738 |
| Operating Income (loss)* | \$(12,698,098) | \$(15,852,679) |
| Total Nonoperating Revenue (expenses) Before Grants | \$13,053,922 | \$12,597,616 |
| Income (loss) before Capital contributions | \$355,824 | |
| Total Equipment and Construction Grants | \$38,665,365 | \$21,065,610 |
| Change in Net Position | \$39,021,189 | \$17,810,547 |
| Net Position, Beginning of Year | \$112,618,858 | \$52,097,953 |
| Net Position, End of Year** | \$151,640,047 | \$69,908,500 |

* Majority of IALR revenue is categorized as nonoperating revenue.

**Net position increase due to new construction.



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