



EASTERN BAND of
CHEROKEE INDIANS

Comprehensive Economic Development Strategy

■ 2022-2026

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CEDS Process and Acknowledgments

■ **The Tribal Council of the Eastern Band Cherokee Indians (EBCI) authorized the EBCI Planning Board, consisting of Tribal Council members, to serve as the Comprehensive Economic Development Strategy (CEDS) Committee. The Planning Board delegated the development of the CEDS to an EBCI working group, comprised of Tribal staff, to be charged with preparing and submitting to the U.S. Economic Development Administration (EDA) an updated CEDS document. This new CEDS document is intended to replace the 2018-2022 CEDS submitted to EDA in 2018.**

The CEDS development was facilitated by Blue Stone Strategy Partners; who also conducted a regional economic analysis and worked directly with the EBCI working group to conduct three working sessions with:

(1) EBCI Tribal Council, (2) EBCI stakeholders' group, composed of Tribal entity representatives and local business owners, and (3) EBCI Planning Board.

The intent and purpose of these sessions were to: gain input to develop and refine EBCI's economic development vision and goals, assess EBCI's Strengths, Weaknesses, Opportunities, and Threats (SWOT), and align EBCI's economic development initiatives and endeavors with other Tribal plans to support the development of the CEDS objectives, strategies, and action plan to achieve the vision and goals. Community involvement was garnered through a live broadcast and available recording of each Work Session and a specific Community Session held to allow for individual input and questions.

EBCI Tribal Council

Richard French — *Chairman*
Albert D. Rose — *Vice Chairman*
Adam Wachacha — *Council Member*
Robert "Bo" Crowe — *Council Member*
Tommye Saunooke — *Council Member*
David Wolfe — *Council Member*
Dennis "Bill" Taylor — *Council Member*
Boyd Owle — *Council Member*
TW Saunooke — *Council Member*
Teresa McCoy — *Council Member*
Bucky Brown — *Council Member*
Dike Sneed — *Council Member*

EBCI Planning Board Members

Richard French — *Tribal Council Chairman*
Dike Sneed — *Tribal Council Member*
Adam Wachacha — *Tribal Council Member*
TW Saunooke — *Tribal Council Member*
Boyd Owle — *Tribal Council Member*
Robert "Bo" Crowe — *Tribal Council Member*

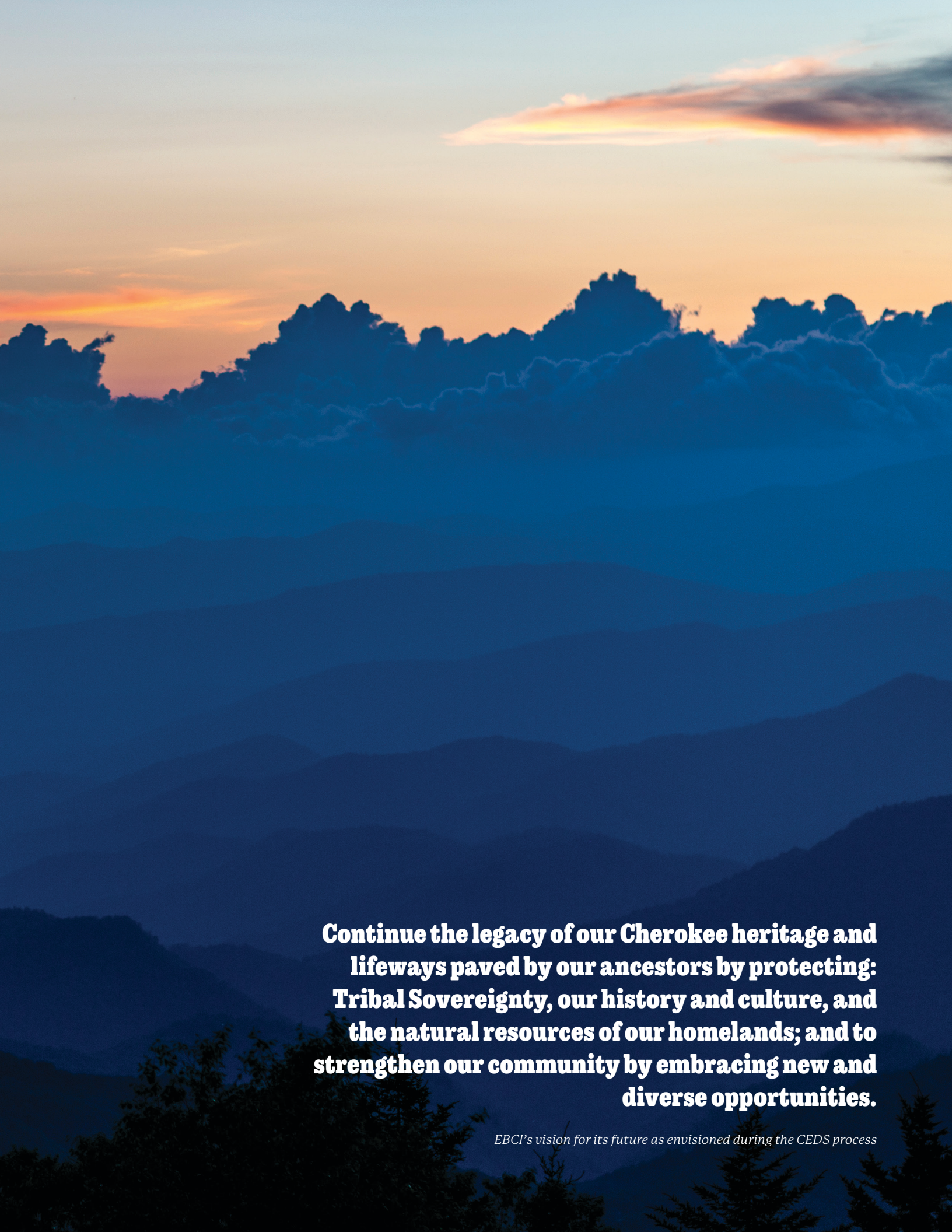
EBCI Working Group

Chris McCoy — *Commerce and Communications*
Christopher Greene — *Project Management*
Michael A. Parker — *Destination Marketing*
Sabrina Arch — *Economic Development*
Travis Sneed — *Support Services*
Kim Deas — *Planning*

Tribal Entities/Stakeholder Group

Adam West — *Assistant GM Cherokee Harrah's Casino*
Amanda Bridgeman — *Business Owner*
Russ Seagle — *Sequoyah Fund*
John Tissue — *Executive Director, Unto These Hills*
Tinker Jennings — *Cherokee Preservation Foundation*
Casey Cooper — *CEO Cherokee Indian Hospital Authority*
Tooney Crowe — *Chairman of Police Commission & Business Owner*
Terri Henry — *Tribal Employment Rights Office (TERO) Director*
Jeremiah Wiggins — *CEO Kituwah LLC*
Greg Owle — *Boys Club*
Scooter McCoy — *Tribal Casino Gaming Enterprise/Casino*
Shana Bushyhead-Condill — *Museum of the Cherokee Indian*
Kym Parker — *Business Owner*





**Continue the legacy of our Cherokee heritage and
lifeways paved by our ancestors by protecting:
Tribal Sovereignty, our history and culture, and
the natural resources of our homelands; and to
strengthen our community by embracing new and
diverse opportunities.**

EBCI's vision for its future as envisioned during the CEDS process

Summary Background

- **The Eastern Band of Cherokee Indians (EBCI) is a federally recognized Native American Tribe located primarily on the Qualla Boundary, which encompasses 56,000 acres held in trust by the federal government specifically for EBCI.**

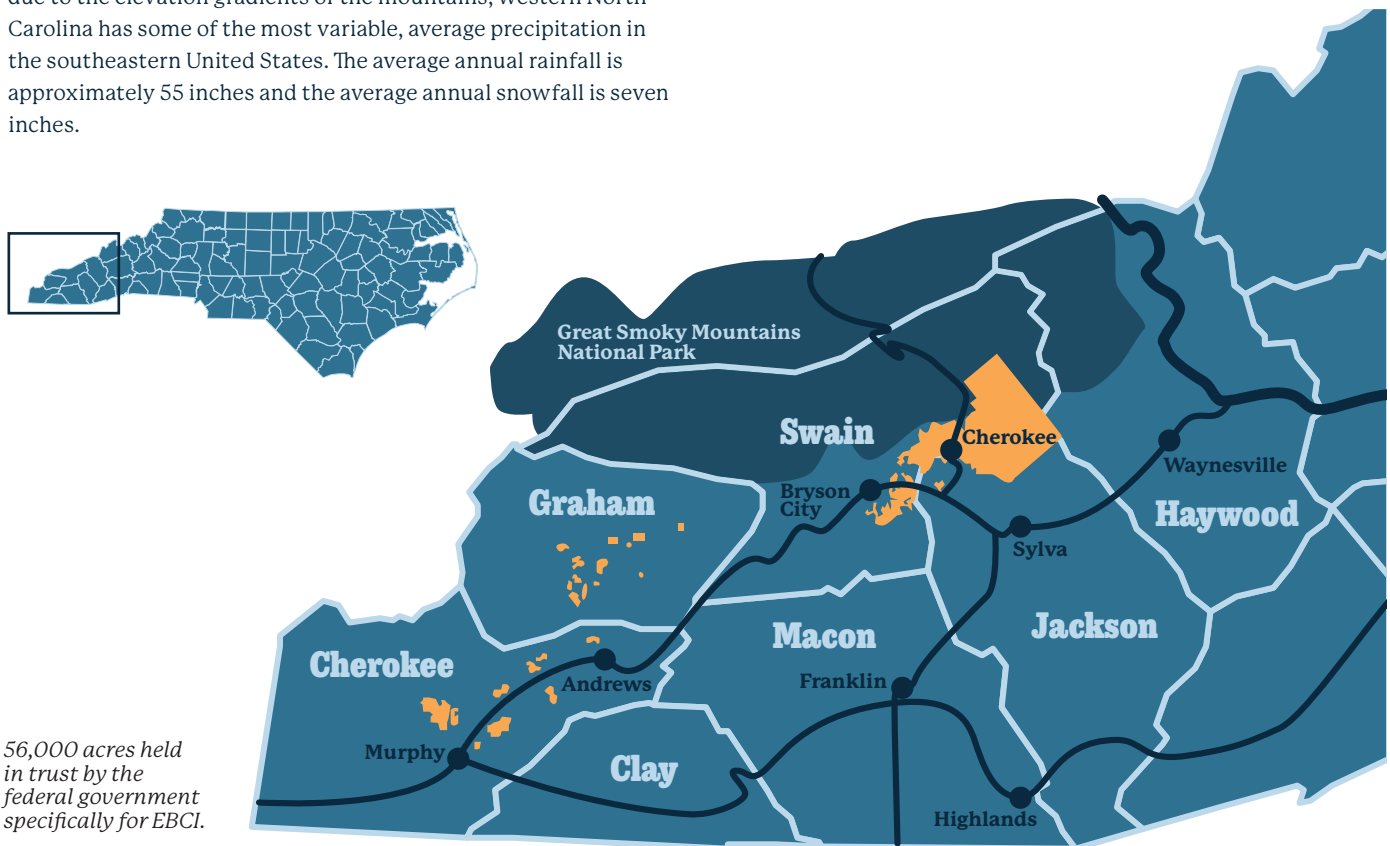
The 100-square-mile sovereign nation of the EBCI encompasses parts of five Western North Carolina counties (largest towns): Cherokee (Andrews/Murphy), Graham (Robbinsville), Jackson (Sylva), Haywood (Waynesville/Maggie Valley), and Swain (Bryson City). Its central community is the town of Cherokee, located within a one-hour drive west of Asheville, NC, and within three hours from several major population centers, including Atlanta GA, Charlotte NC, Chattanooga TN, Greenville/Spartanburg SC, and Knoxville TN. This area is bordered by the Great Smoky Mountains National Park and Blue Ridge Parkway.

Geography and Environment

Western North Carolina has a relatively mild climate year-round; yet, the southern Appalachian terrain and its altitude create a range of average temperatures in the region. As a whole, the region is cooler than adjoining areas; with daytime temperatures varying as much as 20° F, the winter weather falls into the teens or lower, and summers occasionally rise above 90° F. Moreover, due to the elevation gradients of the mountains, western North Carolina has some of the most variable, average precipitation in the southeastern United States. The average annual rainfall is approximately 55 inches and the average annual snowfall is seven inches.

Transportation Access

The Qualla Boundary has ample access to the region's commercial and population centers via U.S. Route 74/Great Smoky Mountains Expressway. The Asheville Regional Airport also services the Boundary. The mean travel time to work for EBCI members is 18.4 minutes.





Natural, Cultural, and Economic Resources

With approximately 88% of the total acreage being located in the forest or unfit for other uses, there is a shortage of developable land within the Qualla Boundary. Of the remaining usable acreage, nearly 50% has already been developed; as a result only around 6% of total acreage is available for development (approximately 3,360 acres). Moreover, land use for agriculture consists mostly of growers producing products for personal consumption and some small-scale produce operations that sell products locally. Additionally, the Qualla Boundary contains the following geographic features:

- Thirty miles of freestone streams running through secluded forest settings, suburban roadside areas, and the center of the town of Cherokee. The trout fishing available in these waterways is a major attraction for visitors.
- A system of well-graded and well-marked trails for both hiking and horseback riding.
- Land leased by the EBCI for timber harvesting generates a modest amount of stumpage income for the Tribe. One important resource on the Qualla Boundary is the Balsam West Fiber Net, a 300-miles underground fiber that provides ten counties in North Carolina, Georgia, and Tennessee with excellent high-speed broadband access. The fiber net was created through a joint venture between EBCI and Drake Enterprises. The Qualla Boundary also contains several attractions that celebrate the history and culture of the Cherokee people:

Oconaluftee Indian Village · An authentic replica of an 18th century Cherokee village, with artisans and guides who demonstrate and explain the history and culture of the Tribe.

Museum of the Cherokee Indian · A non-profit museum depicting the history, culture, and stories of the Cherokee people, with a permanent exhibition, extensive artifact collection, archives, education programs, artist series, and a gift shop.

Unto These Hills: Drama of the Cherokee Indians · A live reenactment of Cherokee history through the mid-1800s performed nightly in an outdoor amphitheater from June through August.

Other cultural attractions include burials sites, arrowhead artifacts, and Cherokee arts and crafts.

Population

U.S. Census ACS 2015-2019 estimates the EBCI population at 8,877. In 2022, EBCI Tribal membership records totaled 16,152 enrolled members. According to the U.S. National Archives and Records Administration, beginning in 1870 the Eastern Cherokee were enumerated among the populations of Cherokee, Graham (established 1872), Jackson, Macon, and Swain (established 1871) Counties for census purposes. A count of American Indian individuals as identified through the Decennial Census in these counties, and with the addition of Haywood County, shows that the EBCI population may reflect a size closer to 9,937.

COVID-19 Impacts on the Population

It is important to note that the CEDS was prepared during the global COVID-19 pandemic. This was a time of unprecedented uncertainty as it relates to public health and the economy. Workplace and business closures, quarantine regulations, and distancing requirements implemented as an effort to decrease the spread of the virus and protect the health of the population all played a major role in influencing the Boundary in a very sudden manner. The effect of COVID-19 was seen throughout the Boundary. Each community in the Boundary experienced cases of COVID-19 with over 3,500 positive cases resulting in 32 deaths as of March, 30th 2022. The majority of cases in the boundary affected those aged 20-49 years old.

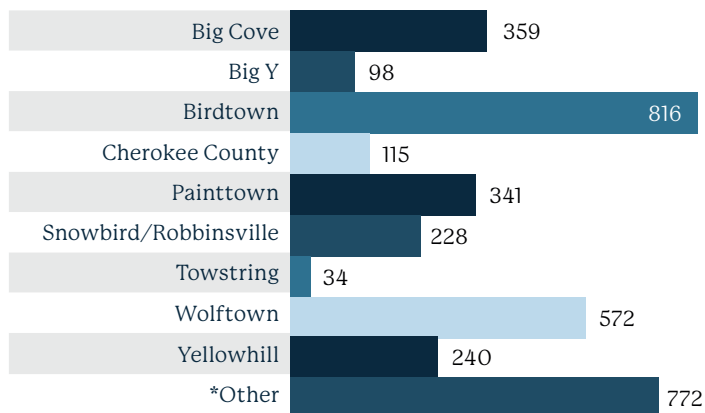
Total Positive COVID-19 Patient Outcomes

Additional Data
COVID Risk Level: Yellow
Total Shots Given: 24,675



March 23-30 Data: Hospitalizations: 0 // Deaths: 0 // Recovered: 3 // Positives: 7 // Negatives: 100
CIHA Testing Data: Total Tests Administered: 44,459 // Total Negative Tests: 40,926 // Pending Tests: 8

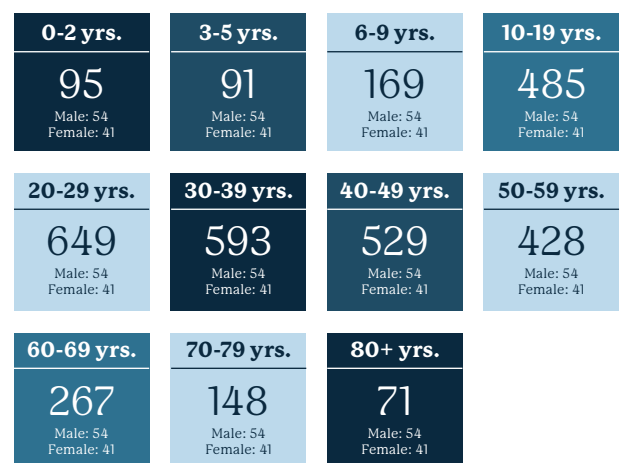
Total Positive COVID-19 Patients by Community



March 23-30 2022 Data: Big Cove: 1 // Big Y: 0 // Birdtown: 4
Cherokee Co.: 0 // Painttown: 1 // Snowbird: 0 // Towstring: 0
Wolftown: 0 // Yellowhill: 0 // Other: 1

**Other includes positives residing outside listed communities or those who did not report community.*

Total Positive COVID-19 Patients by Age Group & Gender



March 23-30 2022 Data: Big Cove: 1 // Big Y: 0
Birdtown: 4 Cherokee Co.: 0 // Painttown: 1 // Snowbird: 0
Towstring: 0 Wolftown: 0 // Yellowhill: 0 // Other: 1

**Other includes positives residing outside listed communities or those who did not report community.*

Updated March 30, 2022



Unemployment & Poverty Rate

The unemployment rate for EBCI has decreased to 3.6% since the 2016 CEDS which listed unemployment at 5.2%.¹ The poverty rate of the EBCI remains higher than comparative counties and the state as a whole (NC 13.6%) at 18.8% and is still higher at 25.4% once disaggregated to show people under 18 years of age in the EBCI community.

Regional Metrics	EBCI	Jackson County	Swain County	North Carolina
Population 2022	8,877	45,208	14,318	10,847,686
Jobs 2022	3,187	16,621	11,006	5,082,195
Bachelor's Degree or Higher %	12.4%	30.6%	19.3%	32.1%
Labor Force Participation Rate Sep 2021	48.8%	53.7%	64.5%	59.6%
Unemployment Rate % Sep 2021	3.6%	3.1%	3.0%	3.4%
Population Below Poverty Level % 2019	18.8%	18.7%	17.5%	12.9%
Median Household Income 2019	\$41,344	\$47,252	\$39,317	\$54,602

Table 1 · Summary of data points for the Eastern Band of Cherokee Indians as compared to Jackson and Swain Counties and the State of North Carolina²

Workforce

EBCI's labor force has a high concentration of high school graduates, with over 81% of Tribal members holding a high school diploma and over 12% holding a bachelor's degree or higher. Statewide these statistics are 87% and 31% respectively. Unfortunately, most Tribal members lack the education and skills needed to participate in high-wage occupations in the region such as those found in the professional, technical, and scientific sectors or high-paying manufacturing jobs. Just under 50% of Eastern Band's population is in the workforce. Most Tribal members are employed in the Arts and Recreation, Food and Accommodation, Education and Health Services, and Public Administration (US Census, My Tribal Area). These employment trends reflect top industry sectors in the regional economy, though, increased technical skills and clear pathways to higher education would benefit Tribal members, Tribally-owned enterprises, and future development opportunities for the Tribe.

Labor Force Breakdown	
Population 16 years and over	6,777
In labor force	3,306
Civilian labor force	3,306
Employed	3,187
Unemployed	119
Armed Forces	0
Not in labor force	3,471
Civilian labor force	3,306
Unemployment Rate	3.6%

Table 2 · EBCI Labor Force

¹ U.S. Bureau of Labor Statistics; U.S. Census

² EBCI Data from 2019 ACS Estimates

Economic Analysis

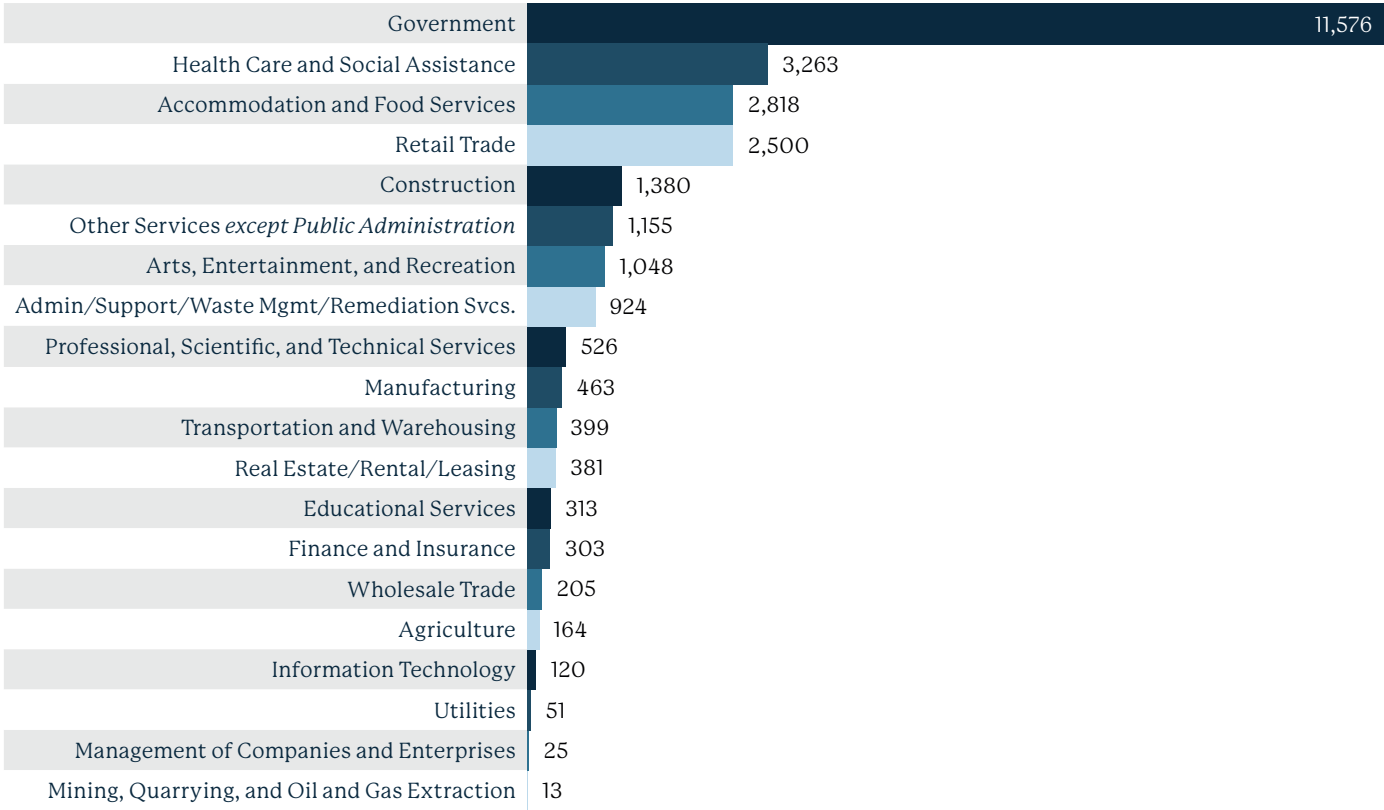
■ The industry and occupational data provided in the next section reflects economic conditions in Swain and Jackson counties since the largest portions of the Qualla Boundary are located in these counties.

From 2015 to 2020, jobs increased by 3.5% in Swain and Jackson Counties from 25,650 to 26,554. This change outpaced the national growth rate of 0.0% by 3.5%. As the number of jobs increased, the labor force participation rate increased from 52.0% to 54.6% between 2015 and 2020. EBCI's labor force participation rate is at 48.7% as of 2019.

Concerning educational attainment in Swain and Jackson counties, 15.2% of the selected regions' residents possess a Bachelor's Degree (4.9% below the national average, 12% for EBCI populous), and 11.0% hold an Associate's Degree (2.4% above the national average). Regional average earnings of \$50,311 per job in Swain and Jackson Counties are \$23,846 below the national average earnings of \$74,158 per job.

The largest industries in the two-county region are Local Government (excluding Education and Hospitals) Education and Hospitals (State Government level), Accommodation and Food Services, Other Services (small business services), Arts, Entertainment and Recreation, and Retail Trade. Based on feedback from Tribal members and correlated to regional demand, the sectors of Arts, Entertainment, and Recreation along with Food and Accommodation reflecting the Hospitality sector are priority areas for development. General small business development to fill local needs and support business attraction is also an identified area for investment.

Top Industries by Employment • Swain and Jackson Counties • see Table 5 for more detailed information and projections





Target Industries

Priority sectors for potential economic growth in the EBCI territory are arts, entertainment, and recreation; hospitality and tourism; and retail trade as related to tourism. Small business development in a variety of service areas is also prioritized based on demand and projected growth shown for the Other Services sector.

Primary indicators for priority sectors including arts and entertainment and hospitality are provided in tables 3 and 4. Metrics are displayed to show the comparison of each sector's economic contribution across Swain and Jackson counties against North Carolina as a state.

Arts, Entertainment, and Recreation	Jackson County	Swain County	North Carolina
Jobs <i>2022</i>	603	445	72,797
Earnings <i>2020</i>	\$54,092	\$35,136	\$42,417
COL Adjusted Earnings	\$56,999	\$35,671	\$44,370
Jobs LQ <i>2022</i>	2.42	2.57	0.97
GRP	\$39,532,160	\$25,356,801	\$4,654,184,443
Demand met in-region %	54.5%	49.2%	62.7%
Demand met by imports %	45.5%	50.8%	37.3%

Table 3 · Economic Indicators for Arts, Entertainment, and Recreation Sector

Accommodation and Food Services	Jackson County	Swain County	North Carolina
Jobs <i>2022</i>	2,040	777	388,877
Earnings <i>2020</i>	\$25,920	\$23,415	\$22,101
COL Adjusted Earnings	\$27,313	\$23,771	\$23,119
Jobs LQ <i>2022</i>	1.69	1.01	1.05
GRP	\$88,810,914	\$41,293,763	\$13,571,776,183
Demand met in-region %	97.1%	92.6%	85.7%
Demand met by imports %	2.9%	7.4%	14.3%


Table 4 · Economic Indicators for Accommodation and Food Services

Workforce Development

The Southwestern Workforce Development Board is one of 23 Boards in North Carolina and serves the counties of Cherokee, Clay, Graham, Haywood, Jackson, Macon and Swain. The Southwestern Workforce Development Board creates an annual plan entitled the Local Area Workforce Plan in conjunction with the priorities of the North Carolina Workforce Strategic Plan and the workforce needs of a seven-county region.

The updated Local Workforce Area (LWA) Plan for 2021-2022 highlights the importance of the hospitality sector and small business development for the region and identifies the external impacts that the pandemic closures have had on the various subsectors within hospitality.

The Eastern Band of Cherokee Indians CEDS seeks to align workforce goals with the LWA to better leverage resources and further engage with the new CREATE Bridges initiative hosted by NC State University intended to boost tourism in the region. This will leverage regional support for hospitality and tourism as a priority sector in the EBCI CEDS goals.



“Small businesses relying on hospitality and tourism is the primary economic driver in our rural area. The pandemic created unique challenges and opportunities for all industries, but this particular sector was hit the hardest. Initial challenges centered around the ability to remain open to the capacity mandated by the Governor and be prepared to change those capacities depending upon the progression of the virus. Those businesses that pivoted in a manner to provide food or services in a drive-thru or to-go capacity have endured and continue to rise to meet new challenges. CREATE Bridges, an acronym for Celebrating Retail, Accommodations, Tourism, and Entertainment by Building Rural Innovations and Developing Growth Economies, is a 2-year initiative led by the Mountain West Partnership, managed by NC State University, and funded by Walmart. It is a current effort underway to bolster the retail, entertainment, accommodations, and tourism sectors in a 5-county area. It was obvious COVID-19 created economic uncertainty and these sectors would require more help and creative ingenuity than ever before. Once complete, the initiative is designed to provide insight to develop new strategies and actions for business retention and expansion.”

— Southwestern Workforce Development Board Local Area Workforce Development Workforce Innovation and Opportunity Act Title I Plans
July 1, 2021 - June 30, 2022



Entrepreneurship for EBCI

Access to resources and support systems for Tribal small business development is a priority economic development strategy supported by data reflecting demand for a variety of *other [business] services* (see Table 5). Investigation into current strengths and potential opportunities in the EBCI community identifies entrepreneurship as a strength, supporting Tribal sovereignty and reflecting traditional economic approaches and strengths for the Tribe. Strategies for expansion of entrepreneurial resources for Tribal members include increasing access to capital through microloan funding and partnering with the local SBA Resource Partners to include the local SBTDC, Women's Business Center, and SCORE to provide technical assistance.

Industry Sector	Jobs 2022	Jobs 2027	Change in Jobs 2022-2027	% Change	Earnings per Worker 2020
Government	11,576	12,114	538	+5%	\$60,583
Health Care and Social Assistance	3,263	3,563	299	+9%	\$61,082
Accommodation and Food Services	2,818	3,227	410	+15%	\$25,218
Retail Trade	2,500	2,484	-16	-1%	\$36,335
Construction	1,380	1,341	-39	-3%	\$44,919
Other Services <i>except Public Administration</i>	1,155	1,284	129	+11%	\$25,217
Arts, Entertainment, and Recreation	1,048	1,283	235	+22%	\$46,358
Admin/Support/Waste Mgmt/Remediation Services	924	991	67	+7%	\$35,302
Professional, Scientific, and Technical Services	526	532	6	+1%	\$61,720
Manufacturing	463	506	43	+9%	\$52,634
Transportation and Warehousing	399	429	30	+7%	\$46,421
Real Estate/Rental/Leasing	381	423	41	+11%	\$48,340
Educational Services	313	352	39	+13%	\$34,120
Finance and Insurance	303	304	1	+0.3%	\$59,546
Wholesale Trade	205	221	16	+8%	\$48,359
Agriculture	164	162	-1	-1%	\$37,753
Information Technology	120	142	22	+18%	\$65,688
Utilities	51	47	-3	-6%	\$124,952
Management of Companies and Enterprises	25	16	-8	-34%	\$56,909
Mining, Quarrying, and Oil and Gas Extraction	13	10	-3	-21%	\$58,583

Table 5 · Largest Industry Sectors — Swain and Jackson Counties
 EMSI Inc., U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages

FOCUS • Outdoor Recreation

- **Eastern Band of Cherokee Indians is well-positioned to take advantage of the growing outdoor recreation industry. The Outdoor Industry Association reports that in the United States the outdoor recreation industry generates \$887 billion in consumer spending annually according to the Outdoor Industry Association report on the Outdoor Recreation Economy. According to the US Bureau of Economic Analysis, the outdoor recreation industry accounted for 123,647 jobs and \$5.2 billion in total compensation in 2020.**

Note that these figures do not include the post-pandemic recovery increase in consumer activity and spending. Other regional plans including the North Carolina Smoky Mountain Blueways' strategic plan and the North Carolina Outdoor Recreation Plan highlight the immense opportunities present in the state, especially in communities adjacent to state and national parks, for the outdoor recreation industry to increase economic activity and opportunity. In 2021 Approximately 14.1 million people visited the

Great Smoky Mountains National Park. People generally see the North Carolina side of the park as wilder and more adventurous. The Eastern Band of Cherokee's territory contains world-class fly fishing and terrain for mountain biking, hiking, and equestrian activities. The town of Cherokee also includes an amenity-rich destination for outdoor recreation enthusiasts to launch their adventures and then celebrate afterward.





SWOT

Strengths

1 Cherokee Heritage

a Common culture, history, and values create and sustain social cohesion

b Community involvement in Cherokee Heritage and culture

2 Tribal sovereignty

a Allows EBCI to provide business incentives that are unique in the region, including accelerated depreciation, Native American employment tax credit, and no county property taxes

b Younger generations have found a renewed connection to Tribal Self-governance initiatives

3 The Qualla Boundary's history as a popular tourist destination provides an established economic base

a Bowling and family entertainment center, hotel expansion, convention center, and Fire Mountain bike trail provide critical venues for the expansion of the tourism base

4 Revenues from the Harrah's Cherokee Casino Resorts in Cherokee and Murphy

a Help fund governmental operations and numerous social programs, including the opportunity for free higher education for all Tribal members

5 The natural surroundings of the Qualla Boundary continue to attract visitors

a The mountains of western North Carolina provide ample reasons for tourist visits

b The Boundary is the gateway to Great Smoky Mountains National Park and Blue Ridge Parkway which brings millions of tourists annually

6 EBCI's track record of attracting federal resources helps maintain and upgrade its infrastructure

a The Balsam West fiber optic loop represents an important investment in the telecom sector

b Raw water processing facilities and wastewater treatment plant provide increased capacity to accommodate economic growth

c Other critical infrastructures include the Justice Center and Cherokee Indian Hospital



Weaknesses

1 Lagging competitiveness in the regional tourism economy

- a* The current consumer tourism infrastructure is outdated
- b* Gaming tourism has grown tremendously, the Qualla Boundary's consumer, cultural, and eco-tourism has languished as a result of the lower focus on these areas
- c* Not enough family-friendly attractions to motivate visitors to stay longer and spend more in the local area

2 Small local population base restricts opportunities to diversify the EBCI economy and support current job vacancies

- a* The local workforce has limited competitive job opportunities
- b* The local housing shortage creates issues in bringing in a workforce to support current open positions in the government, gaming, entertainment, and healthcare sectors

3 Limited available space for new developments within the Qualla Boundary

- a* The condition of the current commercial space is not updated or in proper layout to attract potential business
- b* The small land base and absence of population density are unattractive to many retailers who adhere to the traditional business model for locating stores

4 Lack of supportive infrastructures such as ride-sharing, wayfinding signage, and pedestrian-friendly areas makes it harder to support longer stay times and greater tourist dollar spending in the area

5 The business regulatory process can be cumbersome to investors used to dealing with non-Federal Trust lands

- a* Small businesses have a hard time opening and operating due to the Tribal business process

Opportunities

1 Improving the cultural amenities and tourist infrastructure could strengthen our regional competitiveness

- a* Redevelopment of the downtown area can help bridge the commercial corridor between the Casino and Cultural Districts
- b* The proposed expansion of the Cherokee Museum and the construction of a parking deck would help add a critical mass of consumer tourists to the Cultural District
- c* Creating a more tourist-friendly environment with wayfinding signage

2 Re-establishment of a Chamber of Commerce to support local small businesses

- a* Opportunities to attract diversified small businesses focused on food and entertainment options
- b* Creating a more local business-friendly environment can attract more diversified small businesses to the area

3 Improvement and expansion of Broadband infrastructure will support a great online presence to attract additional tourists and customers to local businesses

- a* Increased online access and presence help businesses reach a wider audience of people supporting increased traffic to the region

4 The recent opening of alcohol sales off Casino property increases the attractiveness of more upscale restaurants and diversified food outlets within the Boundary

5 Current consumer trends as a result of COVID lockdowns increasing outdoor recreation and rural tourism

- a* Cherokee's cultural heritage and history in the area gives the Tribe an advantage over other regional destinations in attracting tourists

6 Offering more housing opportunities to those who work in EBCI's tourism industry could improve workforce retention and satisfaction by reducing their currently long commutes to the Boundary

- a* Increased local population supports a greater variety of local goods and services that can be provided and sustained in the area

7 Income from the Casino provides a source of capital for diversifying EBCI's economy

- a* The development of additional family-friendly attractions and the expansion of the Harrah's Cherokee Casino would improve EBCI's status as the economic engine of Western North Carolina and help position the Boundary as a place to both visit and invest
- b* Passage of the Tribal Investment LLC will prove valuable in the procurement of government contracts through the 8A Program
- c* Continued support for small business development should grow over time the base of entrepreneurs among enrolled member

8 The Tribe's higher education program is turning out many graduates whose expertise could help the local economy

- a* Educated Tribal members increase the availability of the local workforce for higher-skilled positions within the Tribe and its businesses



Threats

1 A continued overdependence on existing tourism and gaming will jeopardize the sustainability of EBCI's economy

a Increased gaming competition from other states negatively impacts Tribal revenues

b Other regional destinations outcompete the Qualla Boundary in terms of the availability of hotel rooms and attractions that consumers desire

2 Under promotion and spend on marketing for the Qualla Boundary and attractions compared to other regional destinations

a Other regional destinations are putting more funding into marketing and promotions capturing a greater number of visitors and tourism dollars into their local economies

b Need to update and better define the ideal market segment to market and attract those tourists and customers to the Boundary

3 Small labor pool among enrolled members and the shortage of quality housing for non-members may make growth more challenging

a The success of Tribal enterprises has created supplemental income for Tribal members reducing their desire to work in certain positions

4 Lack of support for entrepreneurs and small businesses within the Qualla Boundary

a Education and support in local schools supporting the development of entrepreneurs is lacking

b The need for updated broadband connectivity to remain connected to the increasing online economy and opportunities is a basic modern-day necessity

5 The Growing problem of illicit drug use in the country moving into the Qualla Boundary adversely impacts social cohesion within the Boundary

6 Balancing cultural preservation with innovation and technological growth

a The generational divide between the Elders and Youth in the community

Strategy

PRIORITY
1

Diversify Tourism Sector

The Eastern Band of Cherokee Indians has a well-established tourism industry that includes gaming, hospitality, immersive entertainment, historic reenactments, and cultural exchange. There remain great opportunities to expand tourism offerings that increase economic activity and opportunities for the tribal members.

GOAL 1

Position EBCI & Cherokee for growth in target sectors

OBJECTIVES

- Expand the outdoor recreation economy
- Redefine and promote cultural tourism

GOAL 2

Bring in a new demographic of tourists and visitors to Cherokee

OBJECTIVES

- Target and attract higher value visitors
- Increase capture of regional visitors and tourists



PERFORMANCE MEASURES

- Year over year increase in outdoor recreation visitors
- Year over year increase in spending per visitor
- Year over year increase in revenue generated from tourism activities on Boundary

ACTION ITEMS



Immediate · 6 months to 1 year

- Create outdoor recreation asset inventory
- Define target high-value visitor and create specific marketing campaigns for them
- Expand marketing reach to metropolitan areas including Atlanta, Charlotte, Chattanooga, Greenville/Spartanburg, and Knoxville
- Create “experiences” that combine Eco & Agri-tourism with guided cultural immersion

Mid Term · 1 year to 3 years

- Create or attract an outdoor recreation focused sporting event like a fly-fishing tournament or mountain biking competition to Cherokee
- Design high-end exclusive packages for tourists visiting Cherokee, to capture higher value tourists and promote an intimate visiting experience
- Design packages for couples and families that combine amenities and attractions of the surrounding area with lodging and entertainment available in Cherokee



PRIORITY

2

Expand Available Workforce

EBCI has more open positions available on Boundary than they have workers to fill them. This situation impedes the ability to expand operations, capitalize on new opportunities, provide high-value service to guests, and enrich the economy through new business starts and innovation.

GOAL 1

Attract a workforce to work on the Boundary which lives in the vicinity.

OBJECTIVES

Shovel ready market rate housing
Design attraction incentives
Work with State and local counties to create workforce incentives/housing

GOAL 2

Activate local workforce and provide greater opportunities to stay on Boundary

OBJECTIVES

Targeted 2–8 week training programs (sprints) for high vacancy positions
Remote & work from home infrastructure and policies
“Last mile” broadband connectivity



PERFORMANCE MEASURES

Quarterly decrease in open vacant positions

25% increase in available housing units after 5 years

50 graduates of sprints/workforce training programs with 80% placement by year 3

ACTION ITEMS



Immediate · 6 months to 1 year

Convene ISPs providing service in Cherokee to determine causes of low connectivity and feasible solutions to move forward with 80% of homes with wired connections by 2030

Organize State and Local organizations to a series of meetings around workforce housing design and funding

Speak with local employers about the needs they have around vacant positions and skills

Start outreach to Tribal members on and off Boundary to understand potential desirable workforce incentives that can be offered to live and work on Boundary

Design work from home policies to be adopted by government and enterprises

Mid Term · 1 year to 3 years

Launch training sprints in partnership with The WCU Cherokee Center and local employers

Create land use plans, engineering and architectural plans for housing and seek public private partnerships to begin construction

Create roadmap for broadband build out and access

PRIORITY

3

Taxation Policy

EBCI has an opportunity to generate additional revenue by applying its sovereign advantage to tax and levy fees on Boundary

GOAL 1

Manage and collect an equitable levy for Tribal operations

OBJECTIVES

Position Tribe to capitalize upon levying opportunity

Balance levying policy with exceptions for tribal members and businesses



PERFORMANCE MEASURES

Updated levy ordinance(s)

Year over Year increase in revenue generation through the levy process

ACTION ITEMS



Immediate · 6 months to 1 year

Review current levy policies and procedures

Review levy enforcement and collection procedures

Develop business incentives with levy to attract new businesses



PRIORITY
4

Promote & Encourage Private Tribal Businesses

Addressing barriers to starting and growing a business in addition to promoting entrepreneurship and small business ownership naturally serves to diversify the economy and harness the creativity, inventiveness, and ambition of Tribal members for wealth creation and shared prosperity.

GOAL 1

Business promotion & property redevelopment/beautification

OBJECTIVES

Re-establish Chamber of Commerce/Tourism Development Association (TDA)

Establish Wayfinding

Explore The Main Street (four-point) Approach™

GOAL 2

Business Expansion & Entrepreneurship

OBJECTIVES

Equity/revenue share with Tribe

Targeted accelerators

Tourism Venture Studio



PERFORMANCE MEASURES

25% increase in new business starts after year 3

Establishment of Chamber of Commerce and/or Main Street organization after 2 years

10% aggregate increase in revenue for existing businesses after 2 years

ACTION ITEMS



Immediate · 6 months to 1 year

Contact the NC Main Street & Rural Planning Center to explore options and opportunities

Develop wayfinding plan

Survey businesses about potential for Chamber of Commerce

Design and launch accelerator for outdoor recreation businesses

Mid Term · 1 year to 3 years

Establish fund for businesses and startups featuring equity with dividends and/or revenue shares

Launch venture studio for outdoor recreation - validate feasibility and potential for new startup ideas and provide wrap around services for launch once validated

PRIORITY

5

Tribal Government Efficiency

Improving the ways that the Tribal government operates internally and how it interacts with and engages the private sector will increase overall productivity and create a more business-friendly environment overall. This will help encourage business development and private investment within the Boundary.

GOAL 1

Decrease barriers to entry for new business starts (regulation, licensing, etc.)

OBJECTIVES

Consolidate government offices and branches

Develop an Office of Tribal Small Business Advocate to interact with existing and potential businesses, and investors.



PERFORMANCE MEASURES

Single building housing all government offices after 5 years

Creation of the Office of Tribal Small Business Advocate

50% increase in positive interactions with the tribal government

25% increase in productivity

ACTION ITEMS



Immediate · 6 months to 1 year

Create phased consolidation operations plan

Create phased consolidation infrastructure plan

- Develop an asset review process to determine best uses of unoccupied buildings/offices after consolidation

Conduct outreach to the business community about small business advocate services and responsibilities

Create small business advocate position and draft job description



PRIORITY

6

Target Off Boundary Investments

Diversifying the Tribe's investment portfolio and creating standard operating procedures for vetting and investing in opportunities will make the Tribe more resilient to future shocks and disruptions and help grow the overall economy and tribal wealth.

GOAL 1

Diversify Tribal Investment Portfolio

OBJECTIVES

- Develop investment thesis criteria (type, ROI, data, etc.)
- Seek partnerships/co-investors
- Create a website to intake inquiries and build a pipeline for off Boundary investment
- Create a scouting process for potential opportunities



PERFORMANCE MEASURES

- 10% return realized after 5 years
- Pipeline of 15 deals to be reviewed after 2 years
- Firm review process and ROI targets

ACTION ITEMS



Immediate · 6 months to 1 year

- Create and capitalize a fund for off Boundary investments
- Develop investment thesis
- Design and launch website to support off Boundary investment
- Design process for deal flow from initial inquiry to funding, management, and follow-up

Evaluation Framework

ACTION ITEMS



Immediate · 6 months to 1 year

Create outdoor recreation asset inventory

Define target high value visitor and create specific marketing campaigns for them

Expand marketing reach to metropolitan areas including Atlanta, Charlotte, Chattanooga, Greenville/Spartanburg, and Knoxville.

Create “experiences” that combine Eco & Agri-tourism with guided cultural immersion

Convene ISPs providing service in Cherokee to determine causes of low connectivity and feasible solutions to move forward with 80% of homes with wired connections by 2030

Organize State and Local organizations to a series of meetings around workforce housing design and funding

Speak with local employers about the needs they have around vacant positions and skills

Start outreach to Tribal members on and off Boundary to understand potential desirable workforce incentives that can be offered to live and work on Boundary

Design work from home policies to be adopted by government and enterprises

Review current levy policies and procedures

Review levy enforcement and collection procedures

Develop business incentives with Levy to attract new businesses

Contact the NC Main Street & Rural Planning Center to explore options and opportunities

Develop a wayfinding plan

Survey businesses about the potential for a Chamber of Commerce/Tourism Development Association (TDA)

Design and launch an accelerator for outdoor recreation businesses

Create a phased consolidation operations plan

Create a phased consolidation infrastructure plan

Develop an asset review process to determine best uses of unoccupied buildings/offices after consolidation

Conduct outreach to the business community about small business advocate services and responsibilities

Create small business advocate position and draft job description

Create and capitalize a fund for off Boundary investments

Develop investment thesis

Design and launch website to support off Boundary investment

Design process for deal flow from initial inquiry to funding, management, and follow-up



ACTION ITEMS



Mid Term · 1 year to 3 years

Create or attract an outdoor recreation focused sporting event like a fly-fishing tournament or mountain biking competition to Cherokee.

Design high-end exclusive packages for tourists visiting Cherokee, to capture higher value tourists and promote an intimate visiting experience.

Design packages for couples and families that combine amenities and attractions of the surrounding area with lodging and entertainment available in Cherokee

Launch training sprints in partnership with The WCU Cherokee Center and local employers

Create land use plans, engineering, and architectural plans for housing and seek public-private partnerships to begin construction

Create a roadmap for broadband build out and access

Establish a fund for businesses and startups featuring equity with dividends and/or revenue shares

Launch venture studio for outdoor recreation - validate feasibility and potential for new startup ideas and provide wrap-around services for launch once validated

RESPONSIBLE ENTITIES



The CEDS Steering Committee will evaluate progress on action items by maintaining data on progress based on the recommended performance measures. Working with the responsible entity charged with implementing the action item at least one stage gate will be developed. Stage gates will allow the responsible entity to make a go/no-go decision on putting further work, resources, and effort into implementing an action item. Action items that cannot be implemented will be cataloged and archived and then the responsible entity will move on to the next action item or assist in the implementation of another entity's action item. Archived action items will be reviewed each year to determine if work can continue.

- EBCI Division of Commerce and Communications
- EBCI Division of Education and Training
- EBCI Division of Finance
- EBCI Division of Natural Resources
- EBCI Division of Operations

Resilience

- **The concept of resilience is not new to the Eastern Band of Cherokee Indians. From pre-colonization to the times of Tsali and from the opening of the Great Smoky Mountains National Park to the COVID-19 Pandemic the EBCI have shown tremendous resilience in the face of often insurmountable odds. Resilience is woven into the fabric of this comprehensive economic development strategy and represents a core component of the strategy moving forward.**

Nearly every goal and objective in this plan align with either a steady-state or responsive initiative as defined by the EDA.

The following priorities and their associated goals, objectives, and action items are all examples of steady-state initiatives and strategies:

PRIORITY

1

Diversifying the Tourism Sector contains several strategic goals and objectives aimed at broadening the Tribe's economic base and diversifying its economy.

PRIORITY

2

Expand Available Workforce aims to build and maintain a strong and resilient workforce on the Boundary.

PRIORITY

6

Target Off Boundary Investments also aims to diversify revenue streams and opportunities for the Eastern Band of Cherokee.

The following strategies and initiatives are more responsive and enable direct contact between the Tribe, its enterprises, and private businesses in the event of a disaster. Additionally, efforts like revitalizing the Chamber of Commerce, exploring a MainStreet program, and creating a business small business advocate's office in the Tribal government will provide support during normal periods and can be further activated to quickly establish business resources centers and spin-up assistance networks during and after a disaster.

PRIORITY

4

Promote and Encourage Private Tribal Businesses

PRIORITY

5

Tribal Government Efficiency both deal with providing timely and effective business assistance and resources to stabilize and grow existing businesses on the Boundary.



Sources of Information, Statistics, Figures, and Market Assessment Data

Section: Summary Background

» Geography and Environment

- Temperature and Precipitation Statistics (p. 6)
Source: National Park Services - Great Smoky Mountains
www.nps.gov/grsm/planyourvisit/weather.htm

» Natural, Cultural and Economic Resources

- Qualla Boundary Land utilization figures (p. 7)
2018-2022 Eastern Band of Cherokee Comprehensive Economic Development Strategy

» Population

- EBCI Population (p. 8)
Source: EBCI data from 2019 American Community Survey 5-year Estimates
Source: U.S. National Archives and Records Administration
- 2022 EBCI Tribal Enrollment
Source: EBCI Enrollment Office
- American Indian Population
Source: U.S. Decennial Census data for Graham, Haywood, Jackson, Macon, and Swain Counties

» Covid-19 Impacts on the Population (p. 8)

- Graphs 1 - 3
EBCI COVID-19 Dashboard March 31, 2022

» Unemployment & Poverty Rate (p. 9)

- Table 1
Source: EBCI Data from 2019 American Community Survey 5-year Estimates

» Workforce (p. 9)

- Table 2
Source: U.S. Bureau of Labor Statistics
Source: U.S. Census

Section: Economic Analysis

» Target Industries (p. 10-11)

- Top Industries by Employment
Source: EMSI Inc.
- Table 3 Economic Indicators for Arts, Entertainment and Recreation Sector
Source: EMSI Inc.
Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages
- Table 4 Economic Indicators for Accommodation and Food Services
Source: EMSI Inc.
Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages

» Work Force Development

- Regional information workforce development information (p. 12)
Source: Southwestern Workforce Development Board Local Area Workforce Development Workforce Innovation and Opportunity Act Title I Plans July 1, 2021 – June 30, 2022

» Entrepreneurship of EBCI (p.13)

- Table 5 Largest Industry Sectors - Swain and Jackson Counties
Source: EMSI Inc.
Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages

Section: Focus - Outdoor Recreation (p.14)

» Consumer Spending Figures

Source: Outdoor Industry Association report on the Outdoor Recreation Economy
outdoorindustry.org/wp-content/uploads/2017/04/OIA_RecEconomy_FINAL_Single.pdf

» Jobs and Compensation Figures

Source: US Bureau of Economic Analysis
apps.bea.gov/data/special-topics/orsa/summary-sheets/ORSA%20-%20North%20Carolina.pdf

» 2021 Great Smoky Mountains Visitor Figures

Source: National Park Services - Great Smoky Mountains
www.nps.gov/grsm/learn/management/ves.htm#:~:text=Great%20Smoky%20Mountains%20National%20Park%20is%20the%20most%20visited%20national,the%20Public%20Use%20Statistics%20Office

Priority Source Material

Source: Blue Stone Strategy Partners

1. Diversify Tourism Sector

- **Strengths:** The Qualla Boundary's history as a popular tourist destination provides an established economic base; The natural surroundings of the Qualla Boundary continue to attract visitors
- **Weaknesses:** Lagging competitiveness in the regional tourism economy
- **Opportunities:** Improving the cultural amenities and tourist infrastructure could strengthen our regional competitiveness

2. Expand Available Workforce

- **Weaknesses:** Small local population base restricts opportunities to diversify the EBCI economy and support current job vacancies
- **Threats:** Small labor pool among enrolled members and the shortage of quality housing for non-members may make growth more challenging
- **Opportunities:** Offering more housing opportunities to those who work in EBCI's tourism industry could improve workforce retention and satisfaction by reducing their currently long commutes to the Boundary

3. Taxation Policy

- **Strengths:** Tribal sovereignty

4. Promote & Encourage Private Tribal Businesses

- **Weaknesses:** The business regulatory process can be cumbersome to investors used to dealing with non-Federal Trust lands
- **Opportunities:** Re-establishment of a Chamber of Commerce to support local small businesses; Income from the Casino provides a source of capital for diversifying EBCI's economy
- **Threats:** Lack of support for entrepreneurs and small businesses within the Qualla Boundary

5. Tribal Government Efficiency

- **Strengths:** EBCI's track record of attracting federal resources helps maintain and upgrade its infrastructure
- **Weaknesses:** The business regulatory process can be cumbersome to investors used to dealing with non-Federal Trust lands
- **Threats:** Balancing cultural preservation with innovation and technological growth

6. Target Off Boundary Investments

- **Weaknesses:** Limited available space for new developments within the Qualla Boundary
- **Opportunities:** Income from the Casino provides a source of capital for diversifying EBCI's economy
- **Threats:** A continued overdependence on existing tourism and gaming will jeopardize the sustainability of EBCI's economy



Appendices

The Eastern Band of Cherokee Indians Tribal Council Comprehensive Economic Development Input Work Session

February 28, 2022

Work Session Facilitators:

Blue Stone Strategy Partners

Tribal Council Work Session Participants:

Richard French — *Chairman*
Albert D. Rose — *Vice Chairman*
Adam Wachacha — *Council Member*
Robert “Bo” Crowe — *Council Member*
Tommye Saunooke — *Council Member*
David Wolfe — *Council Member*
Dennis “Bill” Taylor — *Council Member*
Boyd Owle — *Council Member*
TW Saunooke — *Council Member*
Teresa McCoy — *Council Member*
Bucky Brown — *Council Member*
Dike Sneed — *Council Member*

Eastern Band of Cherokee Indians 2021-2022

Comprehensive Economic Development Working Group

Session Attendees:

Chris McCoy — *EBCI Commerce and Communications*
Christopher Greene — *EBCI Project Management*
Michael A. Parker — *EBCI Destination Marketing*
Sabrina Arch — *EBCI Economic Development*
Travis Sneed — *EBCI Support Services*
Kim Deas — *EBCI Planning*

Format: In-person working session with Tribal Council Members, Live Broadcast

Work Session Structure & Overview: The work session was focused on gaining overarching direction to support the development for the 2022-2026 Eastern Band of Cherokee CEDS. The session started with introductions from facilitator Blue Stone Strategy Partners, EBCI CEDS working Group members and Tribal Council participants. This was followed with a review of what a CEDS is, the purpose of its development, sections of the CEDS, and the process for CEDS development. After the CEDS overview a review of the importance in planning, key areas of building a strong Tribal economy.

After the introductory information was presented, there was an open discussion with input gathering from the Tribal Council around several different topics to inform the development of the CEDS. Including, COVID-19 impacts for the EBCI, review of CEDS economic priorities and visioning, Strengths, Weakness Opportunities and Threats (SWOT) from the 2018-2022 CEDS (no question or input for this section), and Goals and Objectives from the 2018-2022 CEDS and 2021-2025 Tribal 5-year strategic plan (to align previous planning work and other current EBCI documents with the new CEDS). Blue Stone Strategy Partners posed the following questions and received the corresponding response from Tribal Council for each of these areas during the session. Each sections question is outlined with received responses. (Numbers indicate multiple responses):

COVID-19 Impacts

- **Question: What were the top 3 biggest negative COVID-19 impacts to the community?**
- **Tribal Council responses:**
 - Stores had limited supplies of goods
 - Groceries and food
 - Schools had limited options for remote learning
 - No internet for remote/Virtual learning
 - Lack of Broadband connectivity
 - Loss of Revenues
 - Casino shutdown
 - COVID deaths/Loss of Members
 - Small businesses were impacted
 - Local businesses closing
 - Shut down EBCI Tribal offices
 - Lost wages for Tribal employees
 - Boundary was closed to outside visitors*
 - Lack of tourism/LEVY*
 - Community members fearing for their future

- **Question: What were EBCI's COVID-19 recovery initiatives?**
- **Tribal Council responses:**
 - Schools reopened and kids were able to go back to school
 - Opening of the Casino Expansion
 - CARES/ARPA Funding
 - Customers spent more at our casino
 - We became more efficient
 - People were able to maintain their jobs
 - The Tribe was able to provide support to Tribal members (General Welfare)
 - Utilities support (power)
 - Food Distribution to community members
 - Minimal loss of life and control over health concerns
 - Effective Vaccine rollout to community members and non-members
 - More Community consideration of others
 - Tribe Focused on development of Broadband
 - Cablevision
 - Tribal community listened to scientific findings
 - More Community engagement/ frequent communication with the community
- **Question: Resilience: what do you need to do to maintain economic development that is already in place?**
- **Tribal Council responses:**
 - Invest in broadband infrastructure
 - Refresh our brand
 - Keep casino open
 - Keep Tribal offices open
 - Keep hospital open
 - Continue to upgrade and rebuild
 - Grow based on data
 - Tell our story
 - Education and training
 - Leadership working together
 - Follow and update strategic plan
 - Set obtainable goals and objectives
 - Focus on continued growth
 - Focus on execution of new ideas and projects

CEDS economic priorities and visioning

- **Question: What are your top priorities for economic development at EBCI?**
- **Tribal Council responses:**
 - (3) Re-establish Cherokee as a destination location
 - Add more things here to stop people
 - (3) Support the Cherokee people in participating in the Tribal economy
 - Offer more to Tribal members and their families
 - Bring family and business back to Cherokee
 - Drive revenues
 - More outdoor activities
 - Branding the Cherokee name
 - Tell our story
 - Eco-Tourism
 - Gaming Tourism
 - Agrotourism
 - Diversification
 - Development of the high school, elementary Parcels
 - Develop an artist row
 - Use the whole Boundary

- **Question: What Does success look like 10 years from now?**
- Tribal Council Responses:
 - More opportunities for all our people
 - Be able to buy things here that we have to go buy in nearby towns
 - Making Cherokee a destination once again
 - Thriving new businesses, unemployment at a low, tourism is back
 - Tribal Bank & money circulating in the local economy
 - The ability to keep our history, grab the future, and keep us alive as a group of very special and unique resilient people (Cherokee People)
 - The brand Cherokee would be nationally known
 - Best little Tribe in commerce east of the Mississippi
 - More of our people inside top positions inside the Tribe
 - More job opportunity for our members to come home and work for our Tribe
 - Additional Tribally owned businesses for our town
 - (TsaLaGi Cherokee) Worldwide
 - Tribally Owned bank for enrolled members
 - The Leader in Broadband connection in Western NC
 - Homes for all Families

Goals and Objectives

- **Question: What are the top 5 Goals you would like included in the upcoming CEDS?**
- **Tribal Council responses:**
 - (4) Cultural Tourism/development of cultural site
 - (3) Eco tourism
 - (3) Land/business acquisition plan (off Boundary)
 - (3) Three Branches of Government in one location/One building for all Tribal Programs
 - (2) Infrastructure development/broadband
 - (2) Branding/tell our story
 - (1) Improving the legislative process for efficiency in dealing with project resolutions
 - (1) Better understanding of revenue allocation and obligations
 - (1) Project management process for completing projects/objective/goals
 - (1) Taxation strategy

The Eastern Band of Cherokee Indians Tribal Entities/Stakeholder Comprehensive Economic Development Input Work Session

March 1, 2022

Work Session Facilitators:

Blue Stone Strategy Partners

Tribal Entities/Stakeholder Participants:

Adam West — *Assistant GM Cherokee Harrah's Casino*
Amanda Bridgeman — *Business Owner*
Russ Seagle — *Sequoyah Fund*
John Tissue — *Executive Director, Unto These Hills*
Tinker Jennings — *Cherokee Preservation Foundation*
Casey Cooper — *CEO Cherokee Indian Hospital Authority*
Tooney Crowe — *Chairman of Police Commission & Business Owner*
Terri Henry — *Tribal Employment Rights Office (TERO) Director*
Jeremiah Wiggins — *CEO Kituwah LLC*
Greg Owle — *Boys Club*
Scooter McCoy — *Tribal Casino Gaming Enterprise/Casino*
Shana Bushyhead—Condill — *Museum of the Cherokee Indian*
Kym Parker — *Business Owner*

Eastern Band of Cherokee Indians 2021-2022 Comprehensive Economic Development Working Group Session Attendees:

Chris McCoy — *EBCI Commerce and Communications*
Christopher Greene — *EBCI Project Management*
Michael A. Parker — *EBCI Destination Marketing*
Sabrina Arch — *EBCI Economic Development*
Travis Sneed — *EBCI Support Services*
Kim Deas — *EBCI Planning*

Format: In-person working session with EBCI Entities/Stakeholders, Live Broadcast

Work Session Structure & Overview: The work session was focused on gaining input for the development of draft priorities and objectives for the 2022-2026 Eastern Band of Cherokee CEDS. The session started with introductions from facilitator Blue Stone Strategy Partners, EBCI CEDS working Group members and Tribal entities and stakeholder participants. This was followed with a review of what a CEDS is, the purpose of its development, sections of the CEDS, the process for CEDS development, and review of CEDS evaluation framework. After the CEDS overview a review of the importance in planning, key areas of building a strong Tribal economy.

After the introductory information was presented Tribal Council input were reviewed and there was an open discussion with input gathering from the EBCI entities and stakeholder group around several different topics to inform the development of the CEDS. Including: review of CEDS economic priorities and visioning input from the Tribal Council session (no questions or input in this area were gathered from participants), working with the Tribal government and supportive measures, Strengths, Weaknesses, Opportunities and Threats (SWOT) including review of the SWOT from 2018-2022 CEDS, and priorities, goals and objectives from the 2018-2022 CEDS and 2021-2025 Tribal 5-year strategic plan (to align previous planning work and other current EBCI documents with the new CEDS) including Tribal Council work session input. Blue Stone Strategy Partners posed the following questions and received the corresponding response from participants for each of these areas during the session. Each sections question is outlined with received responses. (Numbers indicate multiple responses):

Working with the Tribal government and supportive measures

- **Question: Top 3 hurdles you face in dealing with the Tribal Government?**
- **Tribal entities and stakeholder's responses :**
 - Accessibility
 - Political Affiliation
 - Broken Promises
 - Tribal Government changes too frequently, along with their priorities
 - Speed of getting things done, if ever
 - Progress held up or stopped because a vocal minority doesn't like the initiative
 - Process is too slow and opaque
 - Lots of waste too many employees
 - There is no unified focus
 - Making sure everyone is briefed on initiatives
 - Multiple resolutions on same issue with no accountability
 - All Council seats rotate at the same time

- Personal Agendas, everyone has a history
- Money disbursement
- Different ideas of success or progress
- Providing depth of information to make decisions
- Access/open discussion
- Understanding priorities/goals
- Some Tribal council not educated enough or don't understand economics
- Small business owners don't know how to navigate the process (i.e. business license, when to go to the BIA, dealing with landlords, etc.)
- Business committee can be a very confusing & Frustrating part of the process for new startups
- Customer service within other departments
- Lack of shared vision
- Election year vs non election year
- Fruition of projects
- Conflicting priorities
- Having an informed constituency so effective and efficient decisions can be made
- Conflicting seasons
- No Cohesive plan. This may be different now that there is a structure in place
- Government moves very slow so leadership changes before things get done
- Leadership changes frequently
- Tribal Leadership has bias toward some programs & against other programs
- Not all leadership have the qualifications to make decisions that are important community
- Leadership is as point of anxiety for this community, it's unhealthy for our people
- Some leadership is devoid of ideas

· **Question: What are the top 3 areas that Tribal Government can support you as an individual, private citizen and business?**

· **Tribal entities and stakeholder's responses:**

- Improve communication
- Welcome ideas and feedback
- Stay out of the way of progress
- Trust: have trust in the people doing the work
- Try to help even if they don't agree
- Be fair to everyone
- If a private citizen has the means and ability to help themselves, don't put up roadblocks to stop them (SUPPORT)
- Once a plan is in place try to complete it
- Listen to the community
- Make sure all avenues are in place before agreeing to do something: idea, funding, plan for completion
- Intentionally connecting with non-government entities in long-term planning
- Assist in laying out clear procedures in project planning
- Intentional listening sessions
- Embrace innovation
- Continue to educate the constituency
- Longer planning horizon, separated from term priorities
- Funding
- Planning together with EBCI entities
- More interaction with divisions to discuss future of Cherokee (What does it mean to everyone)
- Liaison to the public
- Financial support
- Education
- Healthcare
- Employment /funding
- More funds to help grow businesses without having to jump through all kinds of hoops
- Make it mandatory to use enrolled members businesses
- They could put real money to Marketing Cherokee
- Clean up town zoning and ordinance to clear unused property
- Basic job skills training and customers service programs
- Zoning - bring up the standards, expectations of the land owners

- Low interest loans (1-2%) so businesses can invest and will want to invest in improvements
 - Clean up the boundary - weeds, in rock beds, potholes, drainage of water
 - Streamline start-up process (leasing, utilities, licensing, inspections, etc.)
 - Remove the intimidation from the process (i.e., I don't know where to go or This isn't what "so in so" told me to do) Get everyone on the same page
 - To listen and appreciate the efforts with an open mind and Heart; be less critical, actually try to be helpful
- **Question: What infrastructure is needed that could best support your program, enterprise, or business?**
 - **Tribal entities and stakeholder's responses:**
 - (2) IT Support service
 - Technology training services for those who do not understand electronics
 - Recycling
 - (3) Wayfinding signage
 - (2) Workforce housing
 - (5) Broadband
 - (3) Broadband connectivity
 - Clarification of capabilities: Between Programs, government, contracting
 - Share information and be collaborative
 - GIS
 - MLS
 - Traditional water & sewer in adjacent parcels
 - Centralized government services
 - Green energy prioritized
 - Workforce development
 - Tribally owned bank
 - Laws/codes/process for Tribal programs to follow when buying products
 - Develop a chamber of commerce
 - Online business services (i.e. how to obtain business license, pay utilities/rent, log a maintenance request, notify of public repair (potholes, etc.) > one stop shop, more user friendly website
 - New/improved communication system to advertise & promote
 - Improved road systems that offer parking with ease of travel
 - Support for seasonal staff to help meet demand
 - Put in stricter requirements for members to get per capita loans
 - Workforce/labor development services
 - Radio
 - Development of local agriculture to lesson external dependence

Strengths Weaknesses Opportunities and Threats (SWOT)

- **Question: What are the current internal strengths of the Tribal economy?**
- **Tribal entities and stakeholder's responses:**
 - (3) Alcohol sales is now available outside of the Casino (Restaurants)
 - Politically active & Interested Populace
 - Individuals driven by sense of obligation to Tribe/Family/Community
 - Natural Resources (Waterfalls)
 - Resurgence in citizens connecting to authentic Cherokee Heritage
 - Interest in self-representation & Self-governance from younger generations
 - Supportive Tribal Leaders
 - Committed workforce dedicated to community prosperity
 - Access to capital
 - Tribes' investment in supporting members education
 - Development of the agricultural aspect of the Tribe. Actual agriculture no just environment & Natural resources which are important
 - Commitment to Growth
 - Finances continue to grow
 - Cherokee Central School
 - Increased per capita to members from gaming
 - Newer ideas from Youth
 - Additional hotelier (Room Count)

- Convention Center
- Marketable internalities > Everything the Tribe does to support operations on the Boundary, provides quantifiable, tangible, data to Market to federal customers (Facilities, Hospital, Transit, DOT)
- **Question: What are the current internal weaknesses of the Tribal economy?**
- **Tribal entities and stakeholder's responses:**
 - Lagging competencies in tourism economy still a problem > Not enough investment in Infrastructure and dollar spent on marketing & branding
 - Lacking in competitiveness in our tourism region
 - Outdated capital in retail/tourism
 - Lack of zoning
 - Navigating local business process
 - Lack of development of agriculture
 - Local workforce has limited job opportunities
 - (3) Housing shortage
 - (4) Workforce shortage/Job vacancies
 - Wage competitiveness/Livable pay in the area
 - Not enough family attractions
 - Disconnect between youth and Elders (Communication)
 - Limited Available space for development
 - Cumbersome business regulatory and start up process (hard for Mom and Pops)
 - Commercial property availability
 - Condition of available commercial spaces is bad
 - No cohesive vision
 - Lack of public transportation or alternatives (Lyft, Uber)
 - Town not as welcoming as other local towns
 - Lack of healthy food choices
 - Local workforce hard to motivate/hold accountable
 - Barriers to homeownership for Non-EBCI members
 - Neglected/ out of date downtown area
- **Question: What are opportunities that could impact the Tribal economy?**
- **Tribal entities and stakeholder's responses:**
 - Encourage more online presence for business to bring in customers
 - (2) Expand green energy/infrastructure (Electric car chargers)
 - (2) Diversify food outlets/options
 - Housing
 - (2) Broadband
 - Extending eligibility for healthcare services
 - Making Cherokee a destination
 - Retail expansion
 - Radio
 - Infrastructure to support Tribally owned regional museum and cultural sites
 - Agriculture
 - Combine cultural tourism with ecotourism
 - The Riverside development to be walkable and developed
 - (3) Post-COVID Trends in outdoor & Rural recreational tourism
 - Influx of urban residents into workforce
 - Promotion of available job opportunities
 - Development of programs and services not currently in boundary
 - Bike Lanes (especially within cultural, commercial districts)
 - Chamber of commerce & Tribal Programs to work together on things
 - Promote celebrate new businesses (business of the month new service, or features shared)

- **Question: What are potential external threats that could impact the Tribal economy?**
- **Tribal entities and stakeholder's responses:**
 - Behind others in the region and have a lot of catching up to do
 - Underdevelopment in workforce/labor
 - Gaming competition in NC and surrounding states
 - Macro trends => rising interest rates (business, mortgage, etc.)
 - Downward spiral in product maintenance
 - Aging workforce with too few numbers for jobs
 - Too much supplemental money for people to want to work
 - Generational gap/understanding
 - Lack of emphasis on financial literacy in schools
 - Lack of emphasis on entrepreneurial education in schools
 - Underdevelopment of non-gaming tourism
 - (3) Outspent on marketing and promotions by other in region/competitors
 - Bigger and better competition in region
 - Failure to balance innovation with cultural preservation
 - Failure to develop future leadership
 - Failure to identify own market & segment appropriately
 - Lack of development of activities
 - Only putting entities or initiatives in one bucket => allow encourage collaboration
 - Not utilizing off boundary Tribal citizens
 - Lagging broadband
 - Dependence on per capita and per capita loans
 - Under development of private businesses, food entertainment, etc.

Priorities, goals and objectives

- **Question: What additional Priorities should be considered for the upcoming CEDS?**
- **Tribal entities and stakeholder's responses:**
 - Tourism (eco/Green tourists) getting people to stay longer (refreshing Bears)
 - (3) Branding/telling our own story/ Defining our market
 - (2) Revenue diversification
 - Workforce housing
 - Hotel restaurant infrastructure
 - Cleaning up run-down business on boundary/Community involvement and pride
 - Actually, work on strategic plan
 - Commercial development/improve existing commercial properties, Create a sense of business community
 - (2) Workforce development
 - Zoning Enforcement
 - Removal of old decapitated buildings that are an eyesore
 - (2) Master planning/city planning/land use planning/Infrastructure planning
 - Create more pedestrian friendly areas & designated parking
 - Action/accountability
 - Encourage alternative working times/work from home to alleviate traffic issues
 - Single government location
 - Entrepreneur/Artisans support

The Eastern Band of Cherokee Indians Planning Board Members Comprehensive Economic Development Input and Alignment Work Session

March 7, 2022

Work Session Facilitators:

Blue Stone Strategy Partners

Eastern Band of Cherokee Indians Planning Board

Participants:

Richard French — *Tribal Council Chairman*

Dike Sneed — *Tribal Council Member*

Adam Wachacha — *Tribal Council Member*

TW Saunooke — *Tribal Council Member*

Boyd Owle — *Tribal Council Member*

Robert “Bo” Crowe — *Tribal Council Member*

Eastern Band of Cherokee Indians 2021-2022

Comprehensive Economic Development Working Group

Session Attendees:

Chris McCoy — *EBCI Commerce and Communications*

Christopher Greene — *EBCI Project Management*

Michael A. Parker — *EBCI Destination Marketing*

Sabrina Arch — *EBCI Economic Development*

Travis Sneed — *EBCI Support Services*

Kim Deas — *EBCI Planning*

Format: Virtual Working Session with Planning Board Members and EBCI working group members in person and a live stream of the session

Work Session Structure & Overview: The work session was focused on gaining alignment and input for the development of priorities and objectives for the 2022-2026 Eastern Band of Cherokee CEDS. The session started with a review of the input received during the EBCI Tribal Council and Stakeholder working sessions, that supported the development of draft priorities and objectives. Following the review of input the group discussed and provided input to confirm, modify and update the CEDS draft priorities and objectives to support the development of overarching goals. The following is an outline of the draft priorities and objectives with detail on the status of confirmation and noted input for updates to prepare the final CEDS priorities overarching goals and corresponding objectives and action items.

Priority 1: Diversify Tourism Sector

Priority 1 Objectives:

1. Expand the outdoor recreation economy – Confirmed
2. Target and attract higher value visitors – Confirmed
3. Redefine and promote cultural tourism – Confirmed
4. Online Tribal tourism school – Confirmed
5. Re-establish Chamber of Commerce – Confirmed

Priority 2: Expand Available Workforce

Priority 2 Objectives:

1. Shovel ready market rate housing – Confirmed
2. Design attraction incentives – Confirmed
3. Training sprints for high vacancy positions – Confirmed
4. “Last mile” broadband connectivity – Confirmed
5. Remote & work from home infrastructure and policies – Confirmed
6. Work with State and local counties to create workforce incentives/housing – Added Objective during input session

Priority 3: Taxation Policy

Priority 3 Objectives

1. Review Current Levy Policies and procedures – Turn into an action Item
2. Review Levy Enforcement and collection procedures – Turn into an action item
3. Develop Business incentives with Levy to attract new businesses – Turn into an action item

Additional input: Prepare new objectives to capture direction on action items

Priority 4: Promote & Encourage Private Tribal Businesses

Priority 4 Objectives:

1. Business promotion & property redevelopment/beautification [MainStreet] -Confirmed
 - Wayfinding
2. Equity/revenue share with Tribe – Confirmed
3. Targeted accelerators - Confirmed
4. Tourism Venture Studio – Confirmed

Priority 5: Tribal Government Efficiency

1. Decrease barriers to entry for new business starts (regulation, licensing, etc.) – Modify into a goal
2. Consolidate government offices and branches – Confirmed
3. Develop ombudsman office to interact with existing and potential businesses and investors - Confirmed

Priority 6: Target Off Boundary Investments

Priority 6 Objectives:

1. Develop investment thesis criteria (type, ROI, data, etc.) – Confirmed
2. Seek partnerships/co-investors – Confirmed
3. Create website to take inquiries and build pipeline – Confirmed
4. Create scouting process for potential opportunities – Confirmed

The Eastern Band of Cherokee Indians Comprehensive Economic Development Community Input Session

March 7, 2022

Work Session Facilitators:

Blue Stone Strategy Partners

Eastern Band of Cherokee Indians 2021-2022 Comprehensive Economic Development Working Group Session Attendees:

Chris McCoy — *EBCI Commerce and Communications*

Christopher Greene — *EBCI Project Management*

Michael A. Parker — *EBCI Destination Marketing*

Sabrina Arch — *EBCI Economic Development*

Travis Sneed — *EBCI Support Services*

Kim Deas — *EBCI Planning*

Format: Virtual and in-person input Open Session, Live Stream

Work Session Structure & Overview: The Session was focused on EBCI Community Member input on the draft priorities and objectives for the 2022-2026 Eastern Band of Cherokee CEDS. The session started with a review of the draft priorities and objectives. Following the review there was an open time for any community questions and comments with an open podium onsite and telephone line for calls. No additional community input was received during the open input session.

Notes



Comprehensive Economic Development Strategy • 2022-2026

The CEDS development was facilitated by Blue Stone Strategy Partners; who also conducted a regional economic analysis and worked directly with the EBCI working group.



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