

REGIONAL COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

JOINT HOUSING AND PLANNING DIRECTORS COMMITTEES MEETING

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Metropolitan Washington
Council of Governments

A Regional Strategy for a Changing Economy

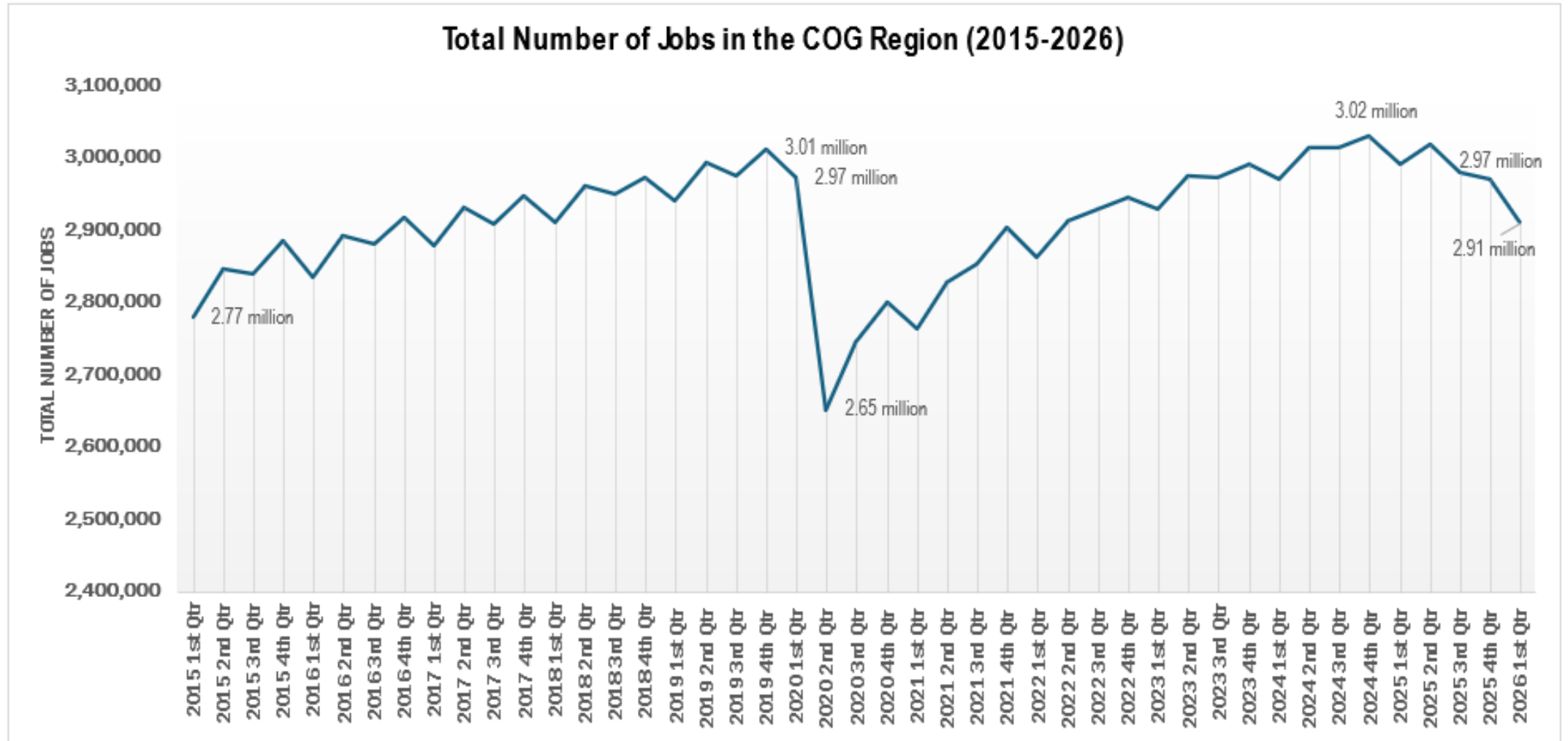
The region is facing new and unprecedented economic conditions.

These challenges cross jurisdictional boundaries – residents, workers, visitors and businesses experience the region as an interconnected place and economy.

We need coordinated solutions.

A shared economic framework can align jobs, businesses, housing, infrastructure and land use so that the region can respond collectively, grow inclusively, compete effectively and build long-term economic resilience.

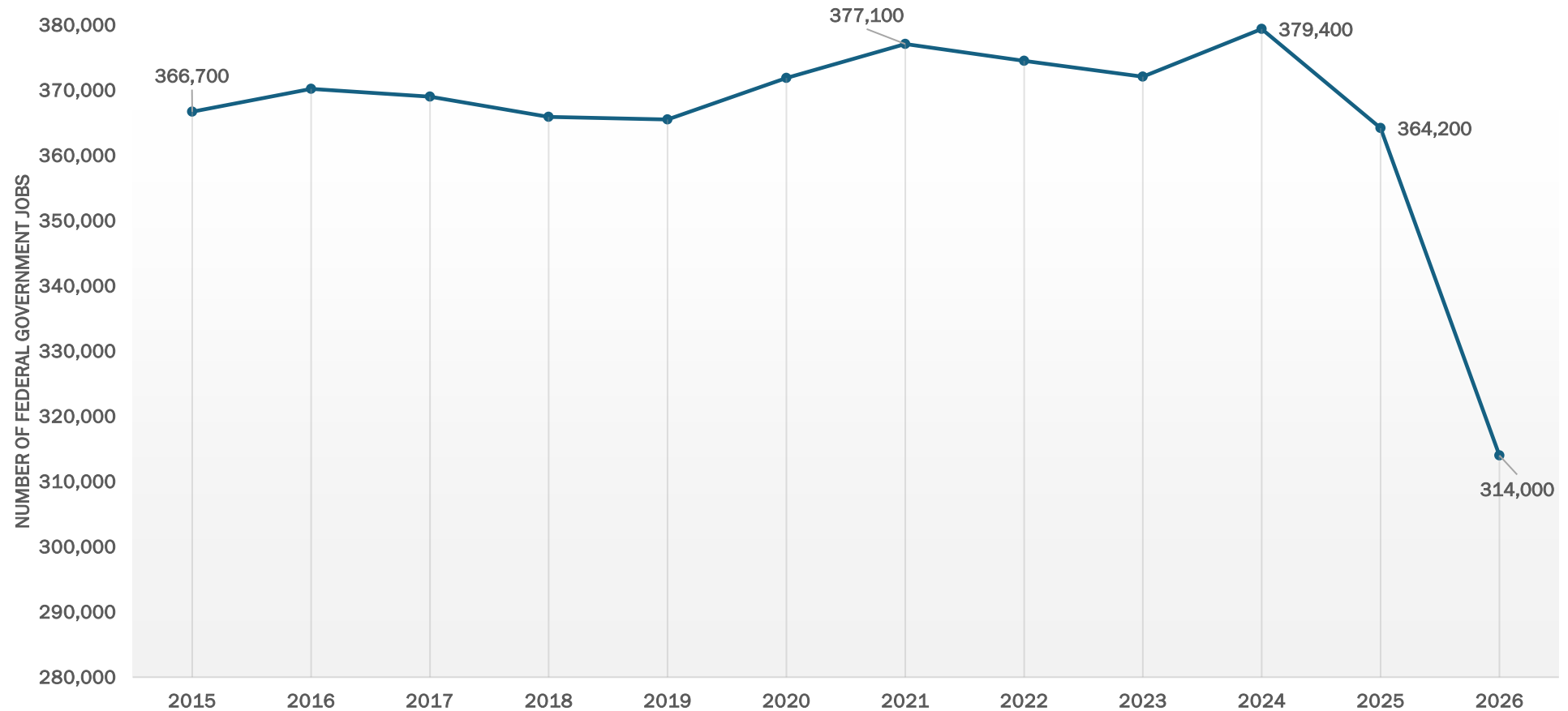
Regional Employment: Recovery and Risk



The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment and wages reported by employers covering more than 95 percent of U.S. jobs. Source: U.S. Bureau of Labor Statistics

Federal Employment Significance

Number of Federal Government Jobs in the Washington MSA
July Data (2015 – 2026)

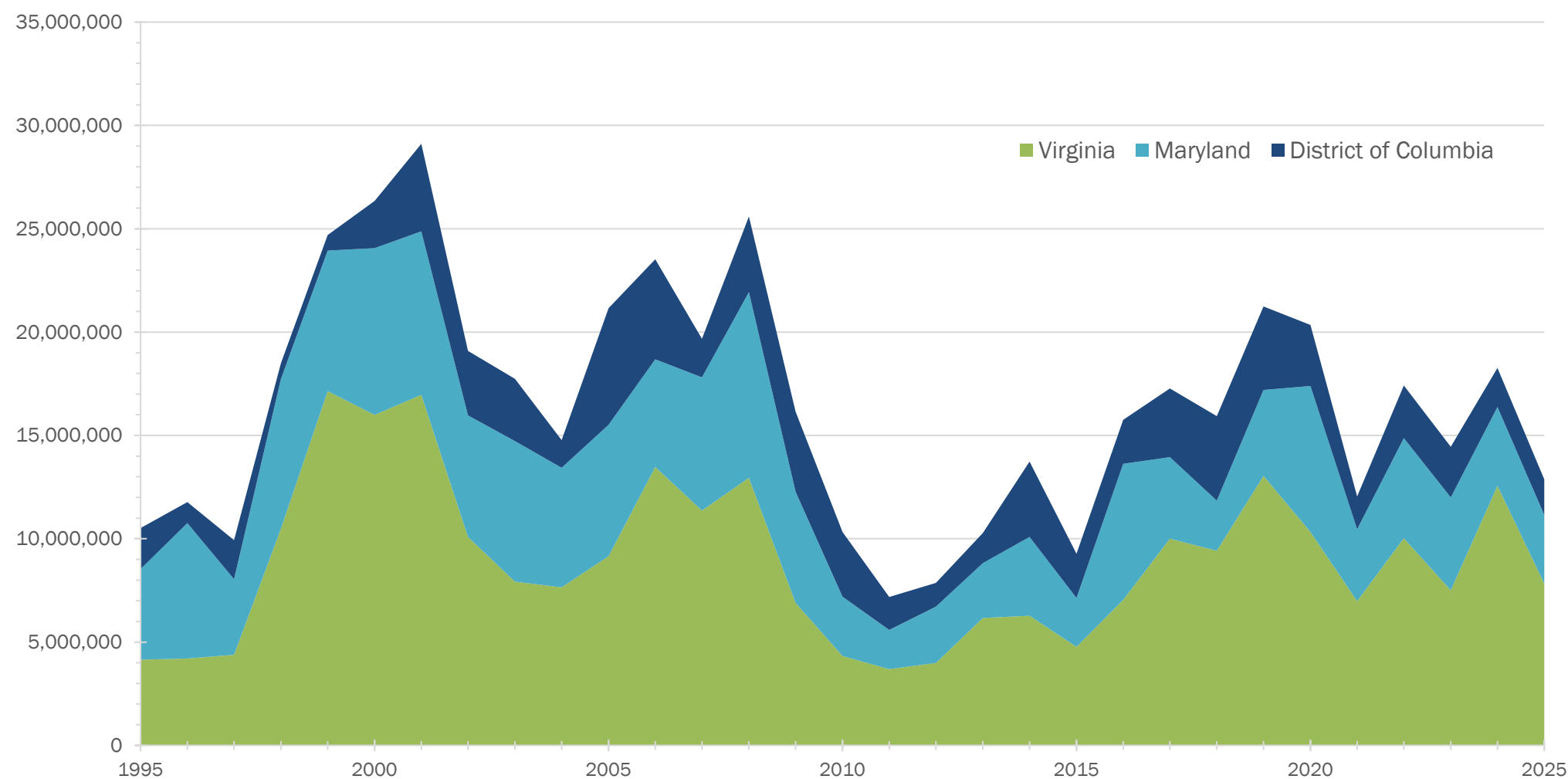


Source: Current Employment Survey, Not Seasonally Adjusted, U.S. Bureau of Labor Statistics

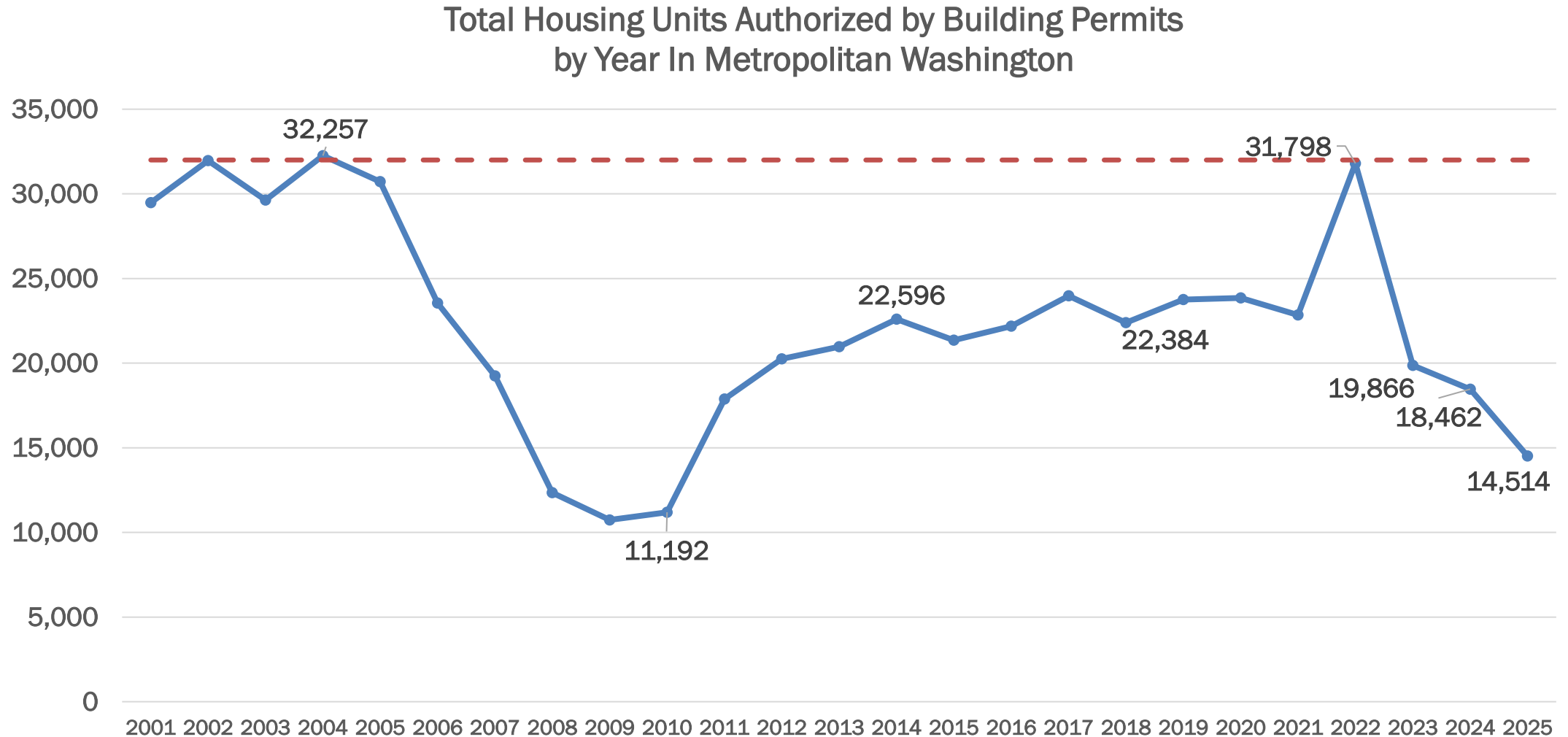


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Commercial Real Estate Adjustment by State, 1995 - 2025

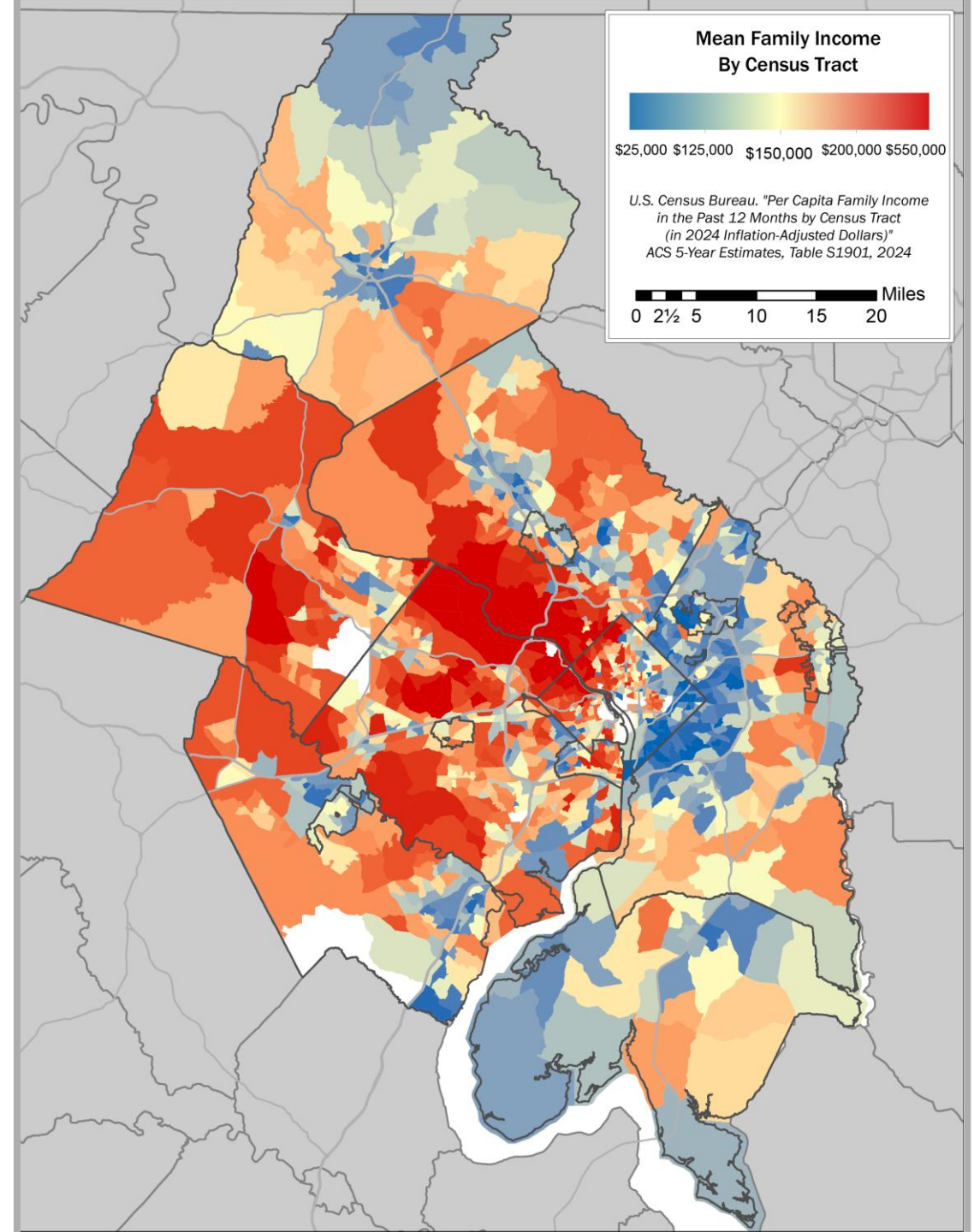


The Region (Still) Needs More Housing



Income Inequality in COG Region

- Mean household income in the COG region ranges from \$27,000 to \$550,000
- Spatial distribution of income differences
 - The western half of the region has significantly higher incomes than the eastern side



What is a Comprehensive Economic Development Strategy (CEDS)?

- A CEDS is a shared, regional strategy for strengthening economic opportunity, competitiveness and resilience
- Brings together leaders from local government, the private sector, non-profit organizations, foundations, and stakeholder groups to identify strategies and share ownership of actions
- Provides the capacity-building foundation for cross-sector collaboration and creates the environment for regional economic prosperity
- Approved by the U.S. Economic Development Administration (EDA), and a starting point for designation as an Economic Development District (EDD)
- The CEDS positions our region to strengthen talent, attract investment, and support business; advance inclusive prosperity and improve quality of life

Housing is Economic Development Infrastructure

Housing, jobs, land use, and infrastructure work together to determine how people access opportunity and businesses access talent.

- Housing availability and affordability shape the labor market by influencing where workers can live and work
- Housing is critical to attracting and retaining residents, workers, and businesses
- Inclusive housing supports a resilient, diverse workforce and expands economic mobility
- Land use and infrastructure connect people to jobs and opportunity — shorter commute times improve workforce access and regional competitiveness
- A diverse mix of places and businesses strengthens economic resilience and supports long-term prosperity

Building the Region's First CEDS

- **What are you seeing?** Are there existing and/or emerging policy and economic trends in your communities that the CEDS should consider?
- **What are our greatest opportunities and barriers?** How can we better align housing, land use and economic development?
- **What are you working on?** What initiatives are underway that we should be aware of and that would align with the CEDS (e.g. Comprehensive Plan, Housing Plan, etc.)?

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