



ROY COOPER
Governor

ANTHONY M. COPELAND
Secretary

MEMORANDUM

To: N.C. General Assembly – Joint Legislative Commission on Governmental Operations
N.C. General Assembly – Joint Legislative Economic Development and Global Engagement Oversight Committee
N.C. General Assembly – Fiscal Research Division

From: Susan Fleetwood, Exec. Director of Economic Development, N.C. Department of Commerce
Mary Elizabeth Wilson, General Counsel, N.C. Department. of Commerce

Date: March 1, 2019

Re: Annual Report on Activities of EDPNC – N.C. Gen. Stat. § 143B-431.01(f)

Pursuant to N.C. Gen. Stat. § 143B-431.01(f), attached you will find a report outlining the performance of certain departmental functions that were contracted to the Economic Development Partnership of North Carolina, Inc. ("EDPNC"), a North Carolina nonprofit corporation. Attached, please find the following information:

Attachment 1 – An executive summary of the most recent annual report submitted by the EDPNC to Commerce pursuant to N.C. Gen. Stat. § 143B-431A(e)(2).

Attachment 2 – A copy of the most recent annual report submitted by the EDPNC to Commerce pursuant to N.C. Gen. Stat. § 143B-431A(e)(2).

Attachment 3 – A listing of each entity referred to Commerce by the EDPNC.

Attachment 4 – A listing of any instances of noncompliance with the enabling legislation or the contract by the EDPNC, and the response to such instances of noncompliance by Commerce, including actions taken by Commerce to prevent repeat or similar instances of noncompliance.

Attachment 5 – A listing of the date and name of each person or entity from whom funds were solicited by the Secretary of Commerce on behalf of the EDPNC.

Attachment 6 – A listing of any entity that received an award from Commerce and also made a gift, contribution, or item or service of value to the EDPNC for which fair market value was not paid.



ROY COOPER
Governor

ANTHONY M. COPELAND
Secretary

ATTACHMENT 1

Executive Summary Economic Development Partnership of North Carolina Calendar Year 2018 Report to the North Carolina Department of Commerce

On October 6, 2014, the North Carolina Department of Commerce ("the Department") entered into a contract with the Economic Development Partnership of North Carolina, Inc. ("EDPNC"), a North Carolina nonprofit corporation. Pursuant to the contract, the EDPNC agreed to operate as the sales and marketing arm of the State, responsible for: business recruitment, existing industry and small business support, import and export assistance, marketing, tourism, film and sports development.

Pursuant to the contract and N.C. Gen. Stat. § 143B-431A(e)(2), the EDPNC has submitted annual reports to Commerce, in which it outlines its program activities, objectives and accomplishments, as well as certain items specifically required by the enabling legislation. The report for calendar year 2018 is included at Attachment 2.

The chart below summarizes the key performance metrics from the 2018 calendar year compared to the 5-Year Average benchmark submitted in the "Report on Performance Metrics for Functions Contracted to the Economic Development Partnership of North Carolina, Inc." ¹

The activities this calendar year, and over the last three fiscal years, have shown improved results each year. The 2018 calendar year results are more in line with the results achieved during 2008, when there were 19,350 new jobs announced and more than \$5 billion in new investment announced.

For business recruitment:	5-Year Average 2009-13	CY 2017	CY 2018
Number of jobs announced by the Department in total.	16,906	19,999	19,541
Number of jobs announced resulting from recruitment of new businesses.	7,348	13,332	11,928
Number of jobs announced resulting from existing business expansions.	9,558	6,667	7,613

¹ On December 1, 2014, the Department submitted a report to the General Assembly entitled "Report on Performance Metrics for Functions Contracted to the Economic Development Partnership of North Carolina, Inc." The performance metrics report was mandated by N.C. Session Law 2014-18, s. 1.3(2), and included certain statutorily required performance metrics for FY 13-14, as well as 5-year average (2009-13).

Total U.S. dollar amount of investment resulting from new projects.	\$3,065,850,003	\$4,146,247,539	\$3,526,442,217
Total U.S. dollar amount of investment resulting from recruitment of new businesses.	\$1,599,866,958	\$2,057,408,700	\$1,859,679,598
Total U.S. dollar amount of investment resulting from existing business expansions.	\$1,465,983,046	\$2,088,838,839	\$1,666,762,619
Total U.S. dollar amount of foreign direct investment.	\$833,901,732	\$2,053,390,248	\$850,502,708
Number of business inquiries for business relocation, investment, and expansion (via website).	129,152	599,914	624,043
For business services:	5-Year Average 2009-13	CY 2017	CY 2018
Number of existing businesses receiving support.	1,363	1,141	1,161
Number of Business Services Team leads that lead to an expansion of existing businesses.	4	75	77
Number of businesses receiving export assistance.	394	588	592
Total U.S. dollar amount of exports by assisted companies.	\$562,004,103	\$884,947,701	\$957,835,597
For tourism and marketing:	5-Year Average 2009-13	CY 2017	CY2018
Number of consumer inquiries about travel to North Carolina.	3,935,636	7,530,199	6,829,940
Total U.S. dollar amount of spending by visitors while in North Carolina.	\$18,126,258,111	\$22,932,130,000	\$23,987,970,000
Total U.S. dollar amount of State and local tax revenues resulting from visitors' spending while in North Carolina.	\$1,505,161,346	\$1,875,750,000	\$1,966,180,000

The North Carolina General Assembly's Performance Evaluation Division issued a report on January 29, 2019 that outlined several shortcomings of the EDPNC and made several recommendations to improve operations and coordination with the party responsible for the EDPNC's contract – the Department of Commerce.

In light of these recommendations it is likely that legislation will be introduced to make structural changes to the EDPNC. Regardless of potential legislative changes, the EDPNC must continue to work with the Department to strengthen efforts and processes to ensure continuous improvement of all the current performance metrics.

To assist with this effort, the Department will provide clarification to the EDPNC regarding its expectations on matters related to business recruitment, business development and tourism marketing in the document that outlines the EDPNC's scope and duties. In addition, adjustments will be made so that there will be reasonable consequences for not meeting the requirements of this contract.

These clarifications will ensure improvements to the ongoing coordination and effectiveness of the limited economic development functions the state is contracting with the EDPNC to provide.

Meanwhile, the Department will continue its long-term strategic focus on preparing communities for economic development opportunities. Such a focus requires a clear vision and dedicated, ongoing cooperation with multiple state agencies and other organizations to ensure objectives related to job creation, workforce, housing, infrastructure, downtown revitalization, innovation and local capacity are met.



2018 Calendar Year Report
The Economic Development Partnership of North Carolina

January 31, 2019
The Honorable Anthony M. Copeland
Secretary
North Carolina Department of Commerce
301 North Wilmington St.
Raleigh, N.C. 27699

Dear Secretary Copeland,

The Economic Development Partnership of North Carolina (EDPNC) respectfully submits its annual report for 2018.

Under its contract with the state Department of Commerce, the EDPNC performs key economic development responsibilities on the state’s behalf. They include recruiting new industry; supporting the growth of existing businesses; helping the state’s manufacturers sell more exports; counseling startups; and promoting North Carolina as a premier destination for tourists, retirees and film productions.

In 2018, the EDPNC’s business recruitment and existing industry teams helped close deals on 143 new corporate facility and expansion projects, resulting in plans for 19,541 new jobs and \$3.5 billion in investment in North Carolina. The job-creation tally in 2018 – the second highest in the last ten years – is only surpassed by the 19,999 jobs announced in 2017.

In 2018, projects in often rural Tier 1 and 2 counties comprised 69 percent of all wins and 38 percent of announced new jobs. Such projects are expected to bring 7,411 new jobs and \$1.7 billion in new capital investment.

The EDPNC business development team is an important part of our business recruitment efforts. The team generates project leads by

cultivating relationships with domestic and international corporations on the cusp of expansion. In 2018, the team expanded its Cary-based staff and opened the state’s first foreign direct investment (FDI) office in India, dedicated to increasing investment in North Carolina from that region. The Bangalore office opened in November, joining a network of FDI offices located in Germany (Europe), China, South Korea and Japan.

The regional industry managers who make up our existing industry team focus on supporting businesses already operating in North Carolina. Each regional manager lives and works within one of eight multicounty Prosperity Zones. Team members routinely visit these businesses, many of them in rural communities, to help them clear potential barriers to growth. They connect businesses to workforce development, lean manufacturing and other resources. They also support these typically small- to mid-size businesses when they expand. Regional industry managers supported 1,161 businesses in 2018.

The export of goods and services is also an important pillar of North Carolina’s economy. And the EDPNC’s international trade team helps companies increase their exporting by providing market intelligence and strategies, product analysis, distributor searches, trade show support and more. In September 2018, the team opened North Carolina’s first permanent trade office in the Middle East – in Dubai, United Arab Emirates – to help companies grow sales in that region.

All told, in 2018 EDPNC’s international trade managers and foreign offices assisted 592 North Carolina businesses in 94 counties. Those companies reported \$957 million in export sales during the year. That exceeds 2017 results, when the trade team supported 559 companies in 80 counties, and those businesses reported \$889.6 million in export sales.

Also, our tourism promotion efforts, which include a highly successful cooperative marketing program with local tourism offices, continued to help increase visitation to the state. The latest available annual figures show visitor spending increased in all 100 North Carolina counties in 2017. Statewide, domestic visitors spent a record \$23.99 billion, a 4.2 percent increase over 2016. Additionally, tourism industry-supported employment reached 225,700 jobs in 2017, to set another state record.



Highlights of 2018 include our Business Link North Carolina team. Primarily through its toll-free line, the team handled 23,043 cases of assisting individuals seeking guidance on the permitting or other requirements of starting or operating a business in North Carolina – with half those inquiries coming from Tier 1 and 2 counties.

Also in 2018, the EDPNC for the first time hosted a conference for local economic developers and civic leaders titled “Energizing Rural North Carolina: The Building Blocks of Successful Economic Development.” The two-day conference was dedicated to inspiring attendees to pursue

strategies within their own rural communities to bolster five pillars of prosperity — infrastructure, workforce, education, health and local leadership. The conference convened 165 local economic developers and civic leaders from 70 counties.

The EDPNC is honored to be a member of our state’s economic development team, led by Governor Cooper and including the North Carolina Department of Commerce, the General Assembly and regional and local economic development organizations. We aspire to even stronger results in 2019.

Sincerely,



Frank E. Emory, Jr.
Board Chairman, Economic Development Partnership of N.C.

Christopher Chung
CEO, Economic Development Partnership of N.C.

BUSINESS RECRUITMENT

BY THE NUMBERS

143 RECRUITMENT AND EXPANSION PROJECTS

- 54 were new facility projects (companies locating in the state for the first time or existing businesses adding another corporate facility/plant here) and 89 were expansions.
- 26 resulted from foreign direct investment.

19,541 ANNOUNCED JOBS

- 11,928 resulted from new facilities and 7,613 from expansions.
- 2,517 resulted from FDI.

\$3.53 BILLION ANNOUNCED INVESTMENT

- \$ 1,859,679,598 resulted from new facilities and \$1,666,762,619 from expansions.
- \$ 850,502,708 resulted from FDI.

In 2018, the EDPNC, working jointly with its local and state economic development partners, helped close deals on 143 corporate relocation and expansion projects – resulting in the announcement of 19,541 new jobs in North Carolina and \$3.52 billion in investment.

The job-creation tally in 2018 was only slightly less than the 19,999 jobs announced in 2017. State-supported job announcements in 2017 and 2018 represent the two highest years posted over the past decade.

The EDPNC divisions that help win new and expanded corporate facilities for North Carolina include:

- The business development team, which generates leads by connecting to companies poised to expand in the U.S.
- Statewide business recruiters who recruit new companies to North Carolina while also courting larger-scale expansions by companies already operating here.
- The existing industry team comprising eight regional industry managers who support the growth of existing companies across the state, including many small businesses.

In terms of jobs created, some of the largest EDPNC-supported wins in 2018 included three massive warehouse distribution projects. Publix Super Markets plans to spend \$300 million on the first phase of a refrigerated distribution center in Greensboro, expected to create up to 1,000 jobs by 2025. Meanwhile, Amazon is placing a new

prototype distribution center in Charlotte, a \$200 million facility expected to bring at least 1,500 new jobs to the area. The e-commerce giant is also building a \$200 million fulfillment center in Garner. That project should create up to 1,500 new jobs and will revive the site of a former ConAgra plant.

The year also saw some major corporate headquarters relocations and expansions in urban areas such as Charlotte and Raleigh.

Fortune 100 industrial conglomerate Honeywell, a major manufacturer of software-oriented core systems for many of the world’s most complex industries, relocated its global headquarters from Morris Plains, N.J., to Charlotte, a move expected to create 750 high-paying jobs. Online loan marketplace leader LendingTree is expanding its Charlotte headquarters by 436 jobs. And AvidXchange, a leading automated payments company, launched a \$41 million headquarters expansion in Charlotte, a move expected to create 1,229 new jobs.

In addition, Fortune 500 automotive retailer Advance Auto Parts is moving its corporate headquarters from Roanoke, Va., to Raleigh. The new facility will be Raleigh’s only Fortune 500 headquarters and will create 450 well-paying new jobs. Meanwhile fast-growing tech startup Pendo, founded in Raleigh in 2013, plans to more than triple its local employment over the next five years. Pendo’s \$34 million investment will establish a new world headquarters site in Raleigh and create 590 new jobs.

2018 also saw significant projects announced

in the state’s Tier 1 and Tier 2 counties. In 2018, 99 EDPNC-supported project wins in Tier 1 and 2 counties called for 7,411 new jobs and \$1.7 billion in new capital investment.

- High-profile wins announced in Tier 1 and 2 counties include the planned 1,000-job, \$300 million Publix distribution center in Guilford County; House of Raeford Farms’ 488-job, \$75 million poultry processing plant expansion in Duplin County; outdoor furniture manufacturer POLYWOOD’s new 384-job, \$35.3 million manufacturing center in Person County; and management and technology consulting firm Booz Allen Hamilton’s 208-job expansion of its Fayetteville operations in Cumberland County.
- Several international companies located projects in Tier 1 and 2 counties in 2018. They included Israeli-based wet wipes maker Albaad USA announcing a 302-job, \$45-million expansion in Rockingham County; Japan-based industrial furnace maker Dowa Thermotech choosing Lee County for a 109-job, \$22.5 million plant; German subsidiary Isotopes Technologies Munchen selecting Catawba County for its first U.S. facility, a radiopharmaceuticals plant that will create 137 jobs; Switzerland-based Neopac US, a global manufacturer of pharmaceutical tube packaging, choosing Wilson County for its first U.S. plant, investing \$30.9 million and creating 44 jobs.

See Appendix A for Business Recruitment performance metrics for 2018

GLOBAL BUSINESS SERVICES

The Global Business Services division connects existing North Carolina businesses to resources that help them reduce operating costs, increase exports and expand their facilities.

The division also houses a team of small-business counselors who help entrepreneurs and startups navigate the permitting and regulatory requirements of starting a new business in the state.

The division’s three teams include: regional industry managers who work within the eight Prosperity Zones covering the entire state; international trade managers who help the state’s small- to mid-sized businesses sell more exports in markets around the world; and Business Link North Carolina counselors who answer thousands of calls a year from individuals seeking guidance on how to start a small business.

Regional Industry Managers

The EDPNC’s team of eight regional industry managers build strong relationships with companies already operating in the state by conducting onsite visits and tours and identifying barriers to growth. Then the managers follow up with resources to clear those hurdles.

The managers help coordinate a wide variety of assistance for existing North Carolina businesses. For example, they connect these businesses with state programs that can help them find qualified workers, grants and loans to buy new manufacturing equipment or renovate buildings, and ways to implement more cost- and energy-efficient manufacturing practices.

The team also supports these existing businesses when they are ready to launch a formal expansion. Team members, who

are often the face of the EDPNC in rural communities, assist many small- to mid-size businesses.

Regional industry managers assisted 1,161 businesses overall (including supporting expansion projects) in 2018. Those interactions reached companies in all 100 counties across North Carolina. In Tier 1 and Tier 2 counties, the EDPNC’s regional industry managers supported 807 existing businesses.

International Trade Managers

The EDPNC international trade team helps North Carolina businesses identify and develop international sales opportunities – free of charge. It includes international trade managers based in North Carolina – each of whom specializes in specific industry sectors. The EDPNC also has trade representatives based in offices in Canada, Mexico, Europe, Japan, China (Hong Kong) and the recently

added United Arab Emirates. The new trade office in Dubai is the state’s first in the Middle East.

All told, in 2018 EDPNC’s international trade managers and foreign offices assisted 592 North Carolina companies in 94 counties. Those companies reported \$957 million in export sales during the year.

The trade team’s services include helping North Carolina businesses find and vet new distributors or agents, referring companies to resources for export financing, and providing export education seminars addressing topics such as export documentation and licensing requirements. In 2018, 91 companies sent employees to participate in EDPNC export education seminars held in Greenville, Hickory, Kannapolis, Charlotte and Fayetteville.

In addition, the EDPNC team leads delegations of North Carolina companies to

international trade shows and helps them arrange meetings there with potential buyers and distributors. Most of the companies the team assists are small- to mid-sized businesses of 500 or fewer employees. During 2018, the EDPNC trade team organized and supported the participation of 144 North Carolina companies in 32 major trade events. Companies exhibited jointly with the EDPNC at diverse shows in locations ranging from Toronto to Moscow.

Business Link North Carolina

In both English and Spanish, the Business Link North Carolina (BLNC) team provides one-on-one counseling to would-be entrepreneurs and startups through its toll-free number and online inquiry form.

The counselors answer questions about licensing and permit requirements and provide access to forms for business

structures, tax ID numbers and more. They also make referrals to local, federal and state agencies, state occupational licensing boards and programs that can help new businesses find grants, alternative lending institutions, mentoring and other resources.

BLNC’s team of four counselors supported 23,043 cases in 2018. Seventy-seven percent of those interactions were with startups.

The team also sponsors or participates in educational outreach activities to support entrepreneurship, including activities that particularly target rural areas and minority-, women-, and veteran-owned startups.

See Appendix B for Global Business Services performance metrics for 2018

The EDPNC’s Visit North Carolina team executes marketing programs that promote our state as a top destination for domestic and international visitors, as well as a great location for film productions and retirees.

The bulk of Visit NC’s marketing efforts focuses on the state’s tourism industry, which supports more than 225,000 jobs and 45,000 lodging, transportation, food service, attraction and retail businesses in the state.

Visit NC’s diverse tourism marketing activities include participating in trade shows and conferences; leading travel-writer tours of the state’s attractions; and executing varied print, digital and TV advertising campaigns. In addition, Visit NC broadly engages primarily rural counties throughout North Carolina in cooperative marketing events and programs that help them affordably highlight their local attractions in statewide marketing initiatives.

One major initiative Visit NC launched in 2018 was its “Firsts That Last” campaign. The unique tourism marketing campaign focuses on real people visiting North Carolina for the first time, each to experience something they had never done before. It included TV spots where camera crews followed these visitors as they had authentic North Carolina experiences.

An Ohio mother and her 5-year-old daughter journeyed to the Outer Banks to see the ocean for the first time. An Alabama newlywed couple explored the waterfalls and forests near Brevard, Mills River and Saluda. A New York couple traveled to Chapel Hill, Benson and Saxapahaw for their first taste of moonshine and the lifestyle of local farms.

The campaign launched April 2018 in target markets including Atlanta, Nashville, Washington, D.C., Philadelphia, Orlando and Columbus. In its first six weeks, overall traffic to VisitNC.com from those markets increased 85 percent over the same period in 2017, from 455,000 to 842,000 website visits.

Big-picture measures of the numbers of visitors heading to the state and the impact of their spending attest to the overall success of the state’s tourism marketing efforts. They include the following figures from an annual Visit NC-commissioned study conducted by the U.S. Travel Association. Study results were released in 2018 and cover visitation by domestic travelers to the state in calendar year 2017:

- North Carolina tourism generated record visitor spending in all 100 counties in 2017, with a total of \$23.9 billion, a 4.2 percent increase over the prior year.

- Visitor expenditures directly supported a record 225,700 jobs, up 2.7 percent from the prior year, and generated more than \$6 billion in payroll income, up 8.5 percent.

- State and local tax receipts from visitor spending rose 4.2 percent, to more than \$1.9 billion.

In 2018, North Carolina tourism generated commercial lodging revenue of \$3.87 billion, a 7 percent increase over the prior year. Hotel room demand in North Carolina rose to 36.8 million room nights booked, up 4.5 percent from 2017.

See Appendix C for Tourism & Marketing performance metrics

The Economic Development Partnership of North Carolina considers several factors in determining employee salaries, including the level of knowledge, experience, years in industry and supervisory skills of the employee (or candidate), as well as market conditions for the position.

To remain competitive, the EDPNC generally monitors what other states and peer organizations pay for economic development and tourism positions. In addition, the EDPNC board of directors has sole discretionary authority to determine compensation for the organization’s chief executive officer, based on performance.

In addition to their salaries, EDPNC employees can receive performance-based compensation based on their divisional and individual performance and achievements during a calendar year. The plan enables the EDPNC to pay an employee performance-based compensation ranging from zero up to 18.75 percent of his or her gross annual salary.

The EDPNC’s executive leadership and board of directors crafted the plan to increase employee accountability and reward strong performance, particularly for achievements that increase economic development in the

state’s rural and low-income areas. All full-time employees and regular part-time employees are eligible to participate in the plan, which is funded by EDPNC’s private investments.

Under the performance-based compensation plan, each EDPNC business unit is allotted a portion of an organization-wide compensation pool, based on the unit’s overall performance relative to certain key performance indicators (KPIs). Business unit employees are eligible for performance-based compensation out of the department’s allotment.

Wherever applicable, the performance metrics determining an employee’s performance-based compensation assign a weight to work that generates outcomes in Tier 1 and Tier 2 counties.

The following table lists EDPNC positions and salaries as of Dec. 31, 2018.

EDPNC SALARIES AND COMPENSATION

Job Title	Salary	From Public Funds	From Private Funds
Accounting Manager	\$64,000.00	\$64,000.00	
Business Development Manager	\$82,600.00	\$82,600.00	
Business Development Manager	\$80,000.00	\$80,000.00	
Business Development Manager	\$76,000.00	\$76,000.00	
Business Recruitment Coordinator	\$47,000.00	\$47,000.00	
Business Recruitment Manager	\$78,600.00	\$78,600.00	
Business Recruitment Manager	\$77,100.00	\$77,100.00	
Business Recruitment Manager	\$68,000.00	\$68,000.00	
Business Recruitment Manager	\$67,000.00	\$67,000.00	
Business Systems Manager	\$81,000.00	\$81,000.00	
Chief Executive Officer	\$245,864.09	\$120,000.00	\$125,864.09
Communications & PR Manager	\$58,650.00	\$58,650.00	
Department Operations Manager	\$50,035.11	\$50,035.11	
Director, Business Development	\$95,000.00	\$95,000.00	
Director, International Trade	\$92,250.00	\$92,250.00	
Director, Regional Operations	\$73,402.82	\$73,402.82	
Director, Regional Operations	\$69,792.56	\$69,792.56	

Job Title	Salary	From Public Funds	From Private Funds
Director, Tourism Research	\$76,277.37	\$76,277.37	
Film Commissioner	\$82,536.45	\$82,536.45	
Grant Manager	\$54,754.80	\$54,754.80	
Grant Manager	\$51,000.00	\$51,000.00	
Graphic Designer	\$55,880.00	\$55,880.00	
International Trade Manager	\$71,925.00	\$71,925.00	
International Trade Manager	\$71,221.01	\$71,221.01	
International Trade Manager	\$70,000.08	\$70,000.08	
Investor Relations Manager	\$72,000.00	\$72,000.00	
Marketing Events Manager	\$68,000.00	\$68,000.00	
Office Manager	\$50,000.00	\$50,000.00	
Regional Industry Manager	\$67,957.91	\$67,957.91	
Regional Industry Manager	\$60,560.20	\$60,560.20	
Regional Industry Manager	\$60,412.49	\$60,412.49	
Regional Industry Manager	\$57,784.03	\$57,784.03	
Regional Industry Manager	\$57,500.00	\$57,500.00	
Regional Industry Manager	\$56,375.00	\$56,375.00	

EDPNC SALARIES AND COMPENSATION

Job Title	Salary	From Public Funds	From Private Funds
Research Analyst	\$63,000.00	\$63,000.00	
Research Analyst	\$60,000.00	\$60,000.00	
Senior Business Recruitment Manager	\$94,000.00	\$94,000.00	
Senior Business Recruitment Manager	\$91,500.00	\$91,500.00	
Senior Business Recruitment Manager	\$85,700.00	\$85,700.00	
Senior International Trade Manager	\$84,991.06	\$84,991.06	
Senior International Trade Manager	\$84,370.69	\$84,370.69	
Senior Manager, Business Development	\$108,150.00	\$108,150.00	
Senior Manager, Business Development	\$100,000.00	\$100,000.00	
Senior Manager, Tourism Marketing	\$82,737.27	\$82,737.27	
Senior Manager, Tourism Partner & Trade Relations	\$83,350.14	\$83,350.14	
Senior Small Business Counselor	\$55,189.33	\$55,189.33	
Small Business Counselor	\$46,440.96	\$46,440.96	
Small Business Counselor	\$40,998.36	\$40,998.36	
Small Business Counselor	\$40,800.06	\$40,800.06	
Staff Accountant	\$48,700.00	\$48,700.00	
Tourism Communications Specialist	\$55,054.06	\$55,054.06	

Job Title	Salary	From Public Funds	From Private Funds
Tourism Coordinator	\$35,700.00	\$35,700.00	
Tourism Database and Social Media Specialist	\$48,321.57	\$48,321.57	
Tourism Industry Relations Specialist	\$57,948.99	\$57,948.99	
Tourism Marketing Specialist	\$51,695.79	\$51,695.79	
Tourism Marketing Specialist	\$51,021.86	\$51,021.86	
Tourism Partner Relations Specialist	\$47,277.00	\$47,277.00	
Tourism Public Relations Manager	\$70,569.98	\$70,569.98	
Tourism Public Relations Specialist	\$41,512.50	\$41,512.50	
VP, Business Recruitment	\$122,000.00	\$120,000.00	\$2,000
VP, Finance and Administration	\$120,000.00	\$120,000.00	
VP, Global Business Services	\$118,000.00	\$118,000.00	
VP, Marketing & Research	\$110,000.00	\$110,000.00	
VP, Tourism	\$119,000.00	\$119,000.00	

The EDPNC strives to attract jobs and capital investment to North Carolina while using limited resources efficiently.

The EDPNC’s funding sources for fiscal year 2018 included the state of North Carolina contract (\$21,869,329 in state funding); grant revenue (\$964,198); private-entity fundraising (\$1,157,647); and other revenues (\$353,259). Itemized expenses for the year included personnel (\$5,992,361); advertising and promotion (\$13,748,548); professional fees, including contracts with foreign trade and investment offices (\$1,814,488); travel and hospitality (\$1,038,394); facilities and utilities (\$396,436); information technology (\$247,999); and other general office expenses (\$188,606).

A copy of the audited financials for EDPNC’s fiscal year ended June 30, 2018, has been provided to the Joint Legislative Economic Development and Global Engagement Oversight Committee, the state Department of Commerce, and the Fiscal Research Division of the North Carolina General Assembly.

More than 70 companies, organizations and individuals invested in the Economic Development Partnership of North Carolina during the fourth year of its operating contract with Commerce in support of the organization’s mission.

The contract requires the EDPNC raise non-state funds to supplement its state funding. During the EDPNC’s fourth contract year beginning Oct. 6, 2017, and ending Oct. 5, 2018, the EDPNC raised \$1,234,750 in private funds. In addition, the General Assembly, through a onetime provision, allowed the EDPNC to carry over funds raised in excess of its requirement in the third year of its contract with the Department of Commerce. Excess funds of \$665,760 from Year 3 were available to carry over in addition to the \$1,234,750 raised in Year 4.

CONTRACT YEAR 4 INVESTORS

Organization/ Individual Name	Investment	Organization/ Individual Name	Investment
Duke Energy	\$200,000.00	First National Bank	\$20,000.00
Martin Marietta	\$100,000.00	Lincoln Harris	\$20,000.00
Red Hat	\$100,000.00	SteelFab	\$20,000.00
Bank of America	\$50,000.00	Bell Foundation	\$15,000.00
ElectriCities	\$50,000.00	Kilpatrick Townsend & Stockton LLP	\$15,000.00
NC REALTORS ®	\$50,000.00	Medical Mutual	\$15,000.00
North Carolina’s Electric Cooperatives	\$75,000.00	Wells Fargo	\$15,000.00
North Carolina Railroad Company	\$50,000.00	SunTrust	\$12,500.00
First Bank	\$40,000.00	Kane Realty	\$12,000.00
PSNC	\$30,000.00	BB&T	\$10,000.00
Balfour Beatty	\$25,000.00	Chatham Park Investors	\$10,000.00
Biltmore Farms	\$25,000.00	Clancy & Theys	\$10,000.00
Flow Lexus	\$25,000.00	Crescent Communities, LLC	\$10,000.00
Joseph M. Bryan Foundation	\$25,000.00	Duke University Health	\$10,000.00
Pinnacle Financial	\$25,000.00	Lowe’s Companies, Inc.	\$10,000.00
Smith Anderson	\$25,000.00	Shelco, LLC	\$10,000.00
Tryon International Equestrian Center	\$25,000.00	Z.V. Pate	\$10,000.00

Organization/ Individual Name	Investment	Organization/ Individual Name	Investment
Allegacy Federal Credit Union	\$7,500.00	Timmons Group	\$2,000.00
AT&T	\$7,500.00	Koury Corporation	\$1,500.00
Aberdeen & Rockfish Railroad Company	\$5,000.00	NAI - Beverly Hanks	\$1,250.00
Barnhill Contracting Company	\$5,000.00	NAI Carolantic Realty	\$1,250.00
CaptiveAire	\$5,000.00	NAI Piedmont Triad	\$1,250.00
Hatteras Venture Partners	\$5,000.00	NAI Southern Real Estate	\$1,250.00
Jeffery & Linda Turner Charitable Fund	\$5,000.00	Ward and Smith	\$1,250.00
K&L Gates	\$5,000.00	Robert Singer	\$1,000.00
NC Bankers Association	\$5,000.00	Grubb Properties	\$1,000.00
PNC	\$5,000.00	Pisgah Enterprises	\$1,000.00
Walbridge	\$5,000.00	Samet Corporation	\$1,000.00
Allen Tate Corporate & Relocation Services	\$3,500.00	Sheila Knight	\$1,000.00
Fidelity Bank	\$2,500.00	Total	\$1,234,750.00
Hunton Andrews Kurth LLP	\$2,500.00		
Jacksonville Onslow ED	\$2,500.00		
Southern Industrial Constructors	\$2,500.00		
Colliers International	\$2,000.00		

RECOMMENDED MODIFICATIONS TO EDPNC'S BOARD OF DIRECTORS

In an effort to strengthen alignment between the EDPNC and the Department of Commerce, the EDPNC proposes that the General Assembly modify the governing statute related to its Board of Directors [G.S. 143B-431.01(d)(2)], such that the number of members is increased from 17 to 18 and that the Secretary of Commerce is added as an ex officio voting member of the Board.

APPENDIX A: BUSINESS RECRUITMENT PERFORMANCE METRICS

Announced Jobs and Capital Investment by County

County	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Alamance	2	39	\$26,000,000.00	1
Alexander	1	14	\$10,000,000.00	0
Alleghany	0	0	\$-	0
Anson	2	52	\$10,234,771.00	0
Ashe	3	40	\$5,600,000.00	0
Avery	0	0	\$-	0
Beaufort	2	83	\$5,165,000.00	1
Bertie	0	0	\$-	0
Bladen	1	100	\$4,000,000.00	1
Brunswick	0	0	\$-	0
Buncombe	3	306	\$135,394,333.00	1
Burke	1	42	\$11,500,000.00	1
Cabarrus	0	0	\$-	0
Caldwell	1	25	\$645,000.00	0
Camden	0	0	\$-	0
Carteret	1	14	\$2,150,000.00	0
Caswell	1	10	\$740,000.00	0

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
39	\$26,000,000.00	1	0	\$10,500,000.00
0	\$10,000,000.00	1	14	\$10,000,000.00
0	\$-	0	0	\$-
0	\$10,234,771.00	2	52	\$10,234,771.00
0	\$5,600,000.00	3	40	\$5,600,000.00
0	\$-	0	0	\$-
58	\$5,165,000.00	1	25	\$2,500,000.00
0	\$-	0	0	\$-
100	\$4,000,000.00	0	0	\$-
0	\$-	0	0	\$-
160	\$135,394,333.00	2	146	\$115,794,333.00
42	\$11,500,000.00	0	0	\$-
0	\$-	0	0	\$-
0	\$645,000.00	1	25	\$645,000.00
0	\$-	0	0	\$-
0	\$2,150,000.00	1	14	\$2,150,000.00
0	\$740,000.00	1	10	\$740,000.00

APPENDIX A: BUSINESS RECRUITMENT PERFORMANCE METRICS

Announced Jobs and Capital Investment by County

County	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Catawba	7	406	\$141,680,000.00	3
Chatham	2	599	\$92,291,073.00	0
Cherokee	5	106	\$105,300,000.00	1
Chowan	0	0	\$-	0
Clay	2	21	\$3,495,845.00	0
Cleveland	0	0	\$-	0
Columbus	1	33	\$938,044.00	0
Craven	2	48	\$3,467,000.00	1
Cumberland	2	227	\$6,004,000.00	1
Currituck	0	0	\$-	0
Dare	1	5	\$1,223,000.00	1
Davidson	0	0	\$-	0
Davie	1	17	\$538,001.00	0
Duplin	1	488	\$75,000,000.00	0
Durham	6	1,498	\$106,400,000.00	6
Edgecombe	0	0	\$-	0
Forsyth	3	720	\$68,027,200.00	0

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
247	\$43,650,000.00	4	159	\$98,030,000.00
0	\$-	2	599	\$92,291,073.00
40	\$100,000,000.00	4	66	\$5,300,000.00
0	\$-	0	0	\$-
0	\$-	2	21	\$3,495,845.00
0	\$-	0	0	\$-
0	\$-	1	33	\$938,044.00
33	\$2,540,000.00	1	15	\$927,000.00
19	\$1,004,000.00	1	208	\$5,000,000.00
0	\$-	0	0	\$-
5	\$1,223,000.00	0	0	\$-
0	\$-	0	0	\$-
0	\$-	1	17	\$538,001.00
0	\$-	1	488	\$75,000,000.00
1,498	\$106,400,000.00	0	0	\$-
0	\$-	0	0	\$-
0	\$-	3	720	\$68,027,200.00

APPENDIX A: BUSINESS RECRUITMENT PERFORMANCE METRICS

Announced Jobs and Capital Investment by County

County	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Franklin	1	20	\$5,526,108.00	0
Gaston	5	758	\$41,281,288.00	3
Gates	0	0	\$-	0
Graham	1	74	\$2,346,000.00	0
Granville	1	300	\$12,000,000.00	1
Greene	2	26	\$3,550,000.00	0
Guilford	3	1,701	\$391,000,000.00	3
Halifax	3	171	\$20,345,948.00	1
Harnett	0	0	\$-	0
Haywood	0	0	\$-	0
Henderson	0	0	\$-	0
Hertford	0	0	\$-	0
Hoke	0	0	\$-	0
Hyde	0	0	\$-	0
Iredell	6	594	\$277,856,514.00	3
Jackson	0	0	\$-	0
Johnston	1	18	\$65,000,000.00	0

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
0	\$-	1	20	\$5,526,108.00
720	\$33,033,257.00	2	38	\$8,248,031.00
0	\$-	0	0	\$-
0	\$-	1	74	\$2,346,000.00
300	\$12,000,000.00	0	0	\$-
0	\$-	2	26	\$3,550,000.00
1,701	\$391,000,000.00	0	0	\$-
50	\$11,900,000.00	2	121	\$8,445,948.00
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	0	0	\$-
471	\$215,300,200.00	3	123	\$62,556,314.00
0	\$-	0	0	\$-
0	\$-	1	18	\$65,000,000.00

APPENDIX A: BUSINESS RECRUITMENT PERFORMANCE METRICS

Announced Jobs and Capital Investment by County

County	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Jones	0	0	\$-	0
Lee	3	167	\$78,500,000.00	1
Lenoir	1	145	\$10,500,000.00	1
Lincoln	4	151	\$58,840,000.00	1
Macon	1	10	\$1,800,000.00	0
Madison	1	28	\$7,000,000.00	0
Martin	0	0	\$-	0
McDowell	2	36	\$7,650,000.00	0
Mecklenburg	9	5,120	\$656,556,500.00	5
Mitchell	1	10	\$5,000,000.00	0
Montgomery	0	0	\$-	0
Moore	1	129	\$2,500,000.00	1
Nash	0	0	\$-	0
New Hanover	1	51	\$25,000,000.00	0
Northampton	0	0	\$-	0
Onslow	3	222	\$3,880,000.00	2
Orange	0	0	\$-	0

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
0	\$-	0	0	\$-
109	\$22,500,000.00	2	58	\$56,000,000.00
145	\$10,500,000.00	0	0	\$-
42	\$1,840,000.00	3	109	\$57,000,000.00
0	\$-	1	10	\$1,800,000.00
0	\$-	1	28	\$7,000,000.00
0	\$-	0	0	\$-
0	\$-	2	36	\$7,650,000.00
2,835	\$546,756,500.00	4	2,285	\$109,800,000.00
0	\$-	1	10	\$5,000,000.00
0	\$-	0	0	\$-
129	\$2,500,000.00	0	0	\$-
0	\$-	0	0	\$-
0	\$-	1	51	\$25,000,000.00
0	\$-	0	0	\$-
198	\$1,750,000.00	1	24	\$2,130,000.00
0	\$-	0	0	\$-

APPENDIX A: BUSINESS RECRUITMENT PERFORMANCE METRICS

Announced Jobs and Capital Investment by County

County	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Pamlico	0	0	\$-	0
Pasquotank	0	0	\$-	0
Pender	0	0	\$-	0
Perquimans	0	0	\$-	0
Person	1	384	\$35,331,000.00	1
Pitt	2	24	\$38,850,000.00	0
Polk	1	43	\$3,050,000.00	1
Randolph	6	89	\$5,189,088.00	0
Richmond	1	40	\$1,963,146.00	0
Robeson	2	37	\$29,564,735.00	0
Rockingham	4	395	\$57,340,940.00	2
Rowan	1	94	\$9,846,692.00	0
Rutherford	0	0	\$-	0
Sampson	0	0	\$-	0
Scotland	1	66	\$58,000,000.00	0
Stanly	3	121	\$7,957,606.00	2
Stokes	0	0	\$-	0

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	0	0	\$-
384	\$35,331,000.00	0	0	\$-
0	\$-	2	24	\$38,850,000.00
43	\$3,050,000.00	0	0	\$-
0	\$-	6	89	\$5,189,088.00
0	\$-	1	40	\$1,963,146.00
0	\$-	2	37	\$29,564,735.00
39	\$11,300,000.00	2	356	\$46,040,940.00
0	\$-	1	94	\$9,846,692.00
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	1	66	\$58,000,000.00
77	\$3,835,000.00	1	44	\$4,122,606.00
0	\$-	0	0	\$-

APPENDIX A: BUSINESS RECRUITMENT PERFORMANCE METRICS

Announced Jobs and Capital Investment by County

County	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Surry	1	10	\$1,059,641.00	1
Swain	0	0	\$-	0
Transylvania	1	33	\$23,650,000.00	0
Tyrell	0	0	\$-	0
Union	1	10	\$2,000,000.00	1
Vance	1	32	\$842,960.00	0
Wake	8	3,340	\$395,152,000.00	5
Warren	0	0	\$-	0
Washington	0	0	\$-	0
Watauga	0	0	\$-	0
Wayne	3	87	\$52,529,810.00	0
Wilkes	1	10	\$644,151.00	0
Wilson	3	97	\$311,321,135.00	1
Yadkin	0	0	\$-	0
Yancey	1	5	\$223,688.00	0
Total	143	19,541	\$3,526,442,217.00	54

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
10	\$1,059,641.00	0	0	\$-
0	\$-	0	0	\$-
0	\$-	1	33	\$23,650,000.00
0	\$-	0	0	\$-
10	\$2,000,000.00	0	0	\$-
0	\$-	1	32	\$842,960.00
2,380	\$219,542,000.00	3	960	\$175,610,000.00
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	0	0	\$-
0	\$-	3	87	\$52,529,810.00
0	\$-	1	10	\$644,151.00
44	\$26,400,000.00	2	53	\$284,921,135.00
0	\$-	0	0	\$-
0	\$-	1	5	\$223,688.00
11,928	\$1,859,679,598.00	89	7,613	\$1,666,762,619.00

APPENDIX A: BUSINESS RECRUITMENT PERFORMANCE METRICS

Announced Jobs and Capital Investment by Tier

Tier	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Tier 1	33	1,398	\$307,426,137.00	5
Tier 2	66	6,013	\$1,387,875,660.00	25
Tier 3	44	12,130	\$1,831,140,420.00	24
Total	143	19,541	\$3,526,442,217.00	54

Announced Jobs and Capital Investment by Prosperity Zone

Zone	Projects Won (Total)	Jobs Announced (Total)	Investment Announced (Total)	Projects Won (New)
Western	15	621	\$282,036,178.00	3
Northwest	18	588	\$182,942,839.00	4
Southwest	31	6,900	\$1,064,573,371.00	15
Piedmont-Triad (Central)	21	2,981	\$549,894,870.00	7
North Central	27	6,455	\$1,102,364,276.00	15
Sandhills (South Central)	9	632	\$102,969,925.00	3
Southeast	14	1,081	\$176,076,810.00	4
Northeast	8	283	\$65,583,948.00	3
Total	143	19,541	\$3,526,442,217.00	54

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
719	\$161,731,000.00	28	679	\$145,695,137.00
3,384	\$572,009,898.00	41	2,629	\$815,865,762.00
7,825	\$1,125,938,700.00	20	4,305	\$705,201,720.00
11,928	\$1,859,679,598.00	89	7,613	\$1,666,762,619.00

Jobs Announced (New)	Investment Announced (New)	Projects Won (Expansion)	Jobs Announced (Expansion)	Investment Announced (Expansion)
243	\$122,650,000.00	12	378	\$159,386,178.00
289	\$55,150,000.00	14	299	\$127,792,839.00
4,155	\$802,764,957.00	16	2,745	\$261,808,414.00
1,789	\$418,859,641.00	14	1,192	\$131,035,229.00
4,715	\$422,173,000.00	12	1,740	\$680,191,276.00
248	\$7,504,000.00	6	384	\$95,465,925.00
376	\$14,790,000.00	10	705	\$161,286,810.00
113	\$15,788,000.00	5	170	\$49,795,948.00
11,928	\$1,859,679,598.00	89	7,613	\$1,666,762,619.00

FOREIGN DIRECT INVESTMENT

Foreign Direct Investment by County

County	Announced Investment	County	Announced Investment
Alamance	\$10,500,000	Lincoln	\$11,000,000
Buncombe	\$19,600,000	Mecklenburg	\$18,470,500
Catawba	\$12,000,000	Mitchell	\$5,000,000
Chatham	\$6,291,073	Moore	\$2,500,000
Cherokee	\$1,800,000	Onslow	\$1,000,000
Durham	\$6,200,000	Rockingham	\$54,000,000
Gaston	\$21,798,000	Scotland	\$58,000,000
Guilford	\$87,000,000	Union	\$2,000,000
Johnston	\$65,000,000	Wake	\$153,072,000
Lee	\$22,500,000	Wilson	\$292,771,135
		Total	\$850,502,708

Foreign Direct Investment by Tier

Tier	Announced Investment
1	\$64,800,000
2	\$501,569,135
3	\$284,133,573
Total	\$850,502,708

Foreign Direct Investment by Prosperity Zone

Zone	Announced Investment
Western	\$21,400,000
Northwest	\$17,000,000
Southwest	\$53,268,500
Piedmont-Triad (Central)	\$151,500,000
North Central	\$545,834,208
Sandhills (South Central)	\$60,500,000
Southeast	\$1,000,000
Northeast	\$-
Total	\$850,502,708

BUSINESS INQUIRIES

During 2018, the EDPNC received 624,043 inquiries for business relocation, expansion or support as measured by web traffic.

APPENDIX B: GLOBAL BUSINESS SERVICES PERFORMANCE METRICS

Existing Companies Supported by County

County	Number of Existing Companies Supported	County	Number of Existing Companies Supported	County	Number of Existing Companies Supported
Alamance	12	Catawba	31	Franklin	4
Alexander	6	Chatham	11	Gaston	14
Alleghany	4	Cherokee	14	Gates	2
Anson	8	Chowan	6	Graham	7
Ashe	7	Clay	4	Granville	8
Avery	5	Cleveland	27	Greene	4
Beaufort	15	Columbus	11	Guilford	47
Bertie	5	Craven	4	Halifax	7
Bladen	11	Cumberland	56	Harnett	4
Brunswick	11	Currituck	2	Haywood	10
Buncombe	41	Dare	15	Henderson	17
Burke	20	Davidson	18	Hertford	3
Cabarrus	2	Davie	3	Hoke	6
Caldwell	10	Duplin	5	Hyde	1
Camden	1	Durham	12	Iredell	16
Carteret	8	Edgecombe	6	Jackson	5
Caswell	3	Forsyth	13	Johnston	9

County	Number of Existing Companies Supported	County	Number of Existing Companies Supported	County	Number of Existing Companies Supported
Jones	9	Pamlico	1	Surry	8
Lee	20	Pasquotank	6	Swain	5
Lenoir	10	Pender	5	Transylvania	9
Lincoln	13	Perquimans	1	Tyrell	5
Macon	6	Person	7	Union	4
Madison	6	Pitt	18	Vance	13
Martin	12	Polk	4	Wake	61
McDowell	20	Randolph	21	Warren	5
Mecklenburg	64	Richmond	11	Washington	4
Mitchell	13	Robeson	18	Watauga	8
Montgomery	22	Rockingham	4	Wayne	12
Moore	25	Rowan	22	Wilkes	9
Nash	16	Rutherford	7	Wilson	18
New Hanover	12	Sampson	12	Yadkin	6
Northampton	6	Scotland	6	Yancey	5
Onslow	7	Stanly	9		
Orange	3	Stokes	2	Total	1161

APPENDIX B: GLOBAL BUSINESS SERVICES PERFORMANCE METRICS

Existing Companies Supported by County

Tier Designation	Number of Existing Companies Supported
Tier 1	299
Tier 2	522
Tier 3	340
Total	1161

Existing Companies Supported by Prosperity Zone

Prosperity Zones	Number of Existing Companies Supported
Western	135
Northwest	138
Southwest	179
Piedmont-Triad (Central)	137
North Central	197
Sandhills (South Central)	178
Southeast	88
Northeast	109
Total	1161

APPENDIX B: GLOBAL BUSINESS SERVICES PERFORMANCE METRICS

Companies Supported by International Trade by County

County	# of Companies Receiving Export Assistance	Export Value (USD)	County	# of Companies Receiving Export Assistance	Export Value (USD)
Alamance	21	\$2,988,608.00	Catawba	22	\$13,188,326.00
Alexander	2	\$2,200,000.00	Chatham	4	\$-
Alleghany	1	\$1,060.00	Cherokee	2	\$-
Anson	2	\$2,700,000.00	Chowan	5	\$1,128,000.00
Ashe	3	\$-	Clay	3	\$-
Avery	5	\$173,606.00	Cleveland	4	\$2,000,000.00
Beaufort	9	\$306,500.00	Columbus	1	\$-
Bertie	1	\$-	Craven	2	\$20,000.00
Bladen	0	\$-	Cumberland	8	\$8,740,148.00
Brunswick	6	\$7,862,243.00	Currituck	1	\$-
Buncombe	27	\$32,163,494.00	Dare	4	\$38,605,579.00
Burke	6	\$4,728,100.00	Davidson	14	\$14,379,244.00
Cabarrus	3	\$2,548,839.00	Davie	3	\$6,000.00
Caldwell	5	\$113,477,908.00	Duplin	1	\$-
Camden	1	\$-	Durham	17	\$4,721,590.00
Carteret	4	\$1,758,543.00	Edgecombe	3	\$1,200,000.00
Caswell	2	\$31,080.00	Forsyth	16	\$6,323,988.00

APPENDIX B: GLOBAL BUSINESS SERVICES PERFORMANCE METRICS

Companies Supported by International Trade by County

County	# of Companies Receiving Export Assistance	Export Value (USD)	County	# of Companies Receiving Export Assistance	Export Value (USD)
Franklin	2	\$-	Jones	2	\$330,452.00
Gaston	8	\$6,160,335.00	Lee	5	\$65,050,766.00
Gates	2	\$-	Lenoir	2	\$-
Graham	1	\$-	Lincoln	1	\$10,419.00
Granville	4	\$4,866,127.00	Macon	2	\$32,678.00
Greene	2	\$3,200,000.00	Madison	1	\$30,100,000.00
Guilford	44	\$172,523,056.00	Martin	4	\$7,052,760.00
Halifax	1	\$-	McDowell	3	\$100,000.00
Harnett	3	\$43,259.00	Mecklenburg	62	\$110,876,638.00
Haywood	4	\$1,040,000.00	Mitchell	3	\$3,850,000.00
Henderson	9	\$82,469,673.00	Montgomery	4	\$450,000.00
Hertford	1	\$28,000.00	Moore	7	\$-
Hoke	3	\$445,611.00	Nash	5	\$266,227.00
Hyde	1	\$-	New Hanover	20	\$48,588,470.00
Iredell	14	\$74,503,249.00	Northampton	1	\$-
Jackson	0	\$-	Onslow	2	\$1,515,036.00
Johnston	1	\$-	Orange	6	\$1,778,401.00

County	# of Companies Receiving Export Assistance	Export Value (USD)	County	# of Companies Receiving Export Assistance	Export Value (USD)
Pamlico	4	\$-	Surry	1	\$-
Pasquotank	1	\$36,962.00	Swain	0	\$-
Pender	3	\$-	Transylvania	2	\$48,000.00
Perquimans	1	\$22,000.00	Tyrell	1	\$-
Person	2	\$110,000.00	Union	6	\$22,609,219.00
Pitt	10	\$14,061,261.00	Vance	3	\$-
Polk	1	\$-	Wake	76	\$20,461,105.00
Randolph	11	\$15,790,411.00	Warren	0	\$-
Richmond	4	\$1,540,002.00	Washington	0	\$-
Robeson	2	\$3,551,794.00	Watauga	2	\$-
Rockingham	2	\$200,000.00	Wayne	3	\$1,200,000.00
Rowan	0	\$-	Wilkes	2	\$-
Rutherford	1	\$-	Wilson	8	\$639,400.00
Sampson	1	\$3,670.00	Yadkin	2	\$9,991.00
Scotland	1	\$-	Yancey	2	\$820,000.00
Stanly	1	\$197,769.00			
Stokes	1	\$-	Total	592	\$957,835,597.00

APPENDIX B: GLOBAL BUSINESS SERVICES PERFORMANCE METRICS

Companies Supported by International Trade by Tier

Tier Designation	# of Existing Companies Supported	State & Local Tax Receipts (in millions)
Tier 1	72	\$26,194,779.00
Tier 2	244	\$515,382,808.00
Tier 3	276	\$416,258,010.00
Total	592	\$957,835,597.00

BUSINESS LEADS

During 2018, 77 Global Business Services leads resulted in a company expansion.

Companies Supported by International Trade by Prosperity Zone

Prosperity Zone	# of Companies Receiving Export Assistance	Export Value (USD)
Western	53	\$145,853,845.00
Northwest	56	\$138,539,000.00
Southwest	101	\$221,606,468.00
Piedmont-Triad (Central)	117	\$212,252,378.00
North Central	139	\$99,136,875.00
Sandhills (South Central)	31	\$14,731,225.00
Southeast	51	\$64,474,744.00
Northeast	44	\$61,241,062.00
Total	592	\$957,835,597.00

APPENDIX C: TOURISM PERFORMANCE METRICS

Visitor Spending and State & Local Tax Revenue by County

County	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)	County	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)
Alamance	\$190.73	\$14.58	Catawba	\$277.27	\$23.64
Alexander	\$20.84	\$2.04	Chatham	\$34.99	\$2.73
Alleghany	\$24.77	\$2.86	Cherokee	\$49.23	\$5.12
Anson	\$17.44	\$1.47	Chowan	\$22.17	\$2.50
Ashe	\$57.65	\$6.12	Clay	\$13.33	\$2.05
Avery	\$125.59	\$11.90	Cleveland	\$110.11	\$8.49
Beaufort	\$86.55	\$9.56	Columbus	\$56.20	\$4.81
Bertie	\$13.96	\$1.58	Craven	\$142.10	\$10.92
Bladen	\$40.55	\$3.65	Cumberland	\$542.31	\$40.83
Brunswick	\$562.63	\$60.67	Currituck	\$230.86	\$24.12
Buncombe	\$1,142.19	\$95.67	Dare	\$1,131.94	\$105.59
Burke	\$101.28	\$8.48	Davidson	\$167.39	\$14.90
Cabarrus	\$446.84	\$33.45	Davie	\$37.94	\$2.81
Caldwell	\$53.04	\$4.56	Duplin	\$41.95	\$3.83
Camden	\$2.09	\$0.29	Durham	\$814.32	\$71.20
Carteret	\$362.40	\$37.89	Edgecombe	\$60.03	\$4.43
Caswell	\$9.16	\$1.09	Forsyth	\$898.38	\$69.86

County	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)	County	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)
Franklin	\$24.42	\$1.99	Jones	\$4.16	\$0.39
Gaston	\$261.75	\$19.35	Lee	\$78.84	\$6.17
Gates	\$6.47	\$0.64	Lenoir	\$88.85	\$6.73
Graham	\$28.14	\$3.23	Lincoln	\$56.60	\$4.86
Granville	\$49.51	\$4.35	Macon	\$170.12	\$21.35
Greene	\$5.89	\$0.54	Madison	\$39.54	\$3.87
Guilford	\$1,408.40	\$105.38	Martin	\$31.75	\$2.53
Halifax	\$96.95	\$8.40	McDowell	\$58.83	\$5.26
Harnett	\$89.70	\$7.05	Mecklenburg	\$5,381.42	\$387.61
Haywood	\$182.27	\$16.99	Mitchell	\$24.10	\$2.13
Henderson	\$294.64	\$26.14	Montgomery	\$29.99	\$4.52
Hertford	\$29.09	\$2.49	Moore	\$491.28	\$39.87
Hoke	\$11.91	\$0.86	Nash	\$292.77	\$23.45
Hyde	\$37.50	\$3.84	New Hanover	\$578.22	\$51.58
Iredell	\$256.88	\$22.11	Northampton	\$14.46	\$1.90
Jackson	\$195.44	\$19.94	Onslow	\$230.65	\$20.95
Johnston	\$239.09	\$19.49	Orange	\$197.99	\$15.02

APPENDIX C: TOURISM PERFORMANCE METRICS

Visitor Spending and State & Local Tax Revenue by County

County	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)	County	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)
Pamlico	\$18.72	\$2.85	Surry	\$124.46	\$9.64
Pasquotank	\$62.66	\$4.91	Swain	\$205.58	\$17.43
Pender	\$97.05	\$11.48	Transylvania	\$99.85	\$8.51
Perquimans	\$10.86	\$1.70	Tyrell	\$3.67	\$0.52
Person	\$36.38	\$2.97	Union	\$139.75	\$10.29
Pitt	\$246.72	\$18.40	Vance	\$50.07	\$4.51
Polk	\$30.73	\$3.37	Wake	\$2,265.91	\$170.18
Randolph	\$146.23	\$11.30	Warren	\$25.75	\$3.26
Richmond	\$49.70	\$3.59	Washington	\$15.35	\$1.52
Robeson	\$152.81	\$11.97	Watauga	\$253.72	\$22.76
Rockingham	\$71.60	\$5.56	Wayne	\$169.32	\$13.23
Rowan	\$174.79	\$15.00	Wilkes	\$78.08	\$5.76
Rutherford	\$181.25	\$16.42	Wilson	\$119.60	\$9.40
Sampson	\$52.21	\$4.63	Yadkin	\$39.08	\$3.07
Scotland	\$45.02	\$3.29	Yancey	\$38.64	\$4.49
Stanly	\$81.14	\$7.18			
Stokes	\$25.42	\$2.32	Total	\$23,987.97	\$1,966.18

APPENDIX C: TOURISM PERFORMANCE METRICS

Visitor Spending and State & Local Tax Revenue by Tier

Tier Designation	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)
Tier 1	\$1,923.89	\$183.09
Tier 2	\$8,216.38	\$678.75
Tier 3	\$13,847.70	\$1,104.34
Total	\$23,987.97	\$1,966.18

CONSUMER INQUIRIES

During 2018, EPNDC’s tourism division – VisitNC – received 6,829,940 consumer inquiries as measured by web traffic plus call center activity.

Visitor Spending and State & Local Tax Revenue by Prosperity Zone

Prosperity Zone	Visitor Spending (in millions)	State & Local Tax Receipts (in millions)
Western	\$2,632.31	\$240.09
Northwest	\$1,113.81	\$100.00
Southwest	\$6,926.72	\$509.81
Piedmont-Triad (Central)	\$3,118.79	\$240.51
North Central	\$4,379.37	\$346.20
Sandhills (South Central)	\$1,471.98	\$118.02
Southeast	\$2,301.94	\$221.06
Northeast	\$2,043.05	\$190.49
Total	\$23,987.97	\$1,966.18



ROY COOPER
Governor

ANTHONY M. COPELAND
Secretary

Attachment 3

Listing of Each Entity Referred to Commerce by the EDPNC in 2018

Companies Locating or Expanding in North Carolina (Referred in 2018, Announced in 2018)

Entity	Jobs Announced	Capital Investment Announced	Tier	County
ACC Coatings, LLC	10	\$1,059,641.00	2	Surry
Advance Auto Parts, Inc.	435	\$5,470,000.00	3	Wake
Advanced Drainage Systems	13	\$3,428,031.00	2	Gaston
AirBoss Rubber Compounding	42	\$5,200,000.00	1	Halifax
Albaad USA	302	\$45,000,000.00	2	Rockingham
Alta Foods LLC	30	\$1,144,122.00	2	Wayne
Amada America, Inc.	201	\$87,000,000.00	2	Guilford
Ambella Home Collection	12	\$281,098.00	2	Randolph
American Timber Group	74	\$2,346,000.00	1	Graham
Apex Investments Inc (A.D. Tubi Inossidabili SpA)	19	\$6,291,073.00	3	Chatham
Arch Capital Group	365	\$12,900,000.00	3	Wake
AveXis	200	\$55,000,000.00	3	Durham
AvidXchange Inc	1,229	\$41,000,000.00	3	Mecklenburg
Berry Global, Inc.	20	\$52,136,436.00	3	Iredell
Booz Allen Hamilton	208	\$5,000,000.00	2	Cumberland
Bradington-Young LLC	13	\$4,500,000.00	2	Catawba
BRP USA (Bombardier Recreational Products)	10	\$5,000,000.00	1	Mitchell
Buchi Tea	28	\$7,000,000.00	2	Madison
Cambridge-Lee Industries LLC	19	\$1,004,000.00	2	Cumberland
CaptiveAire Systems Inc	20	\$5,526,108.00	2	Franklin
Carolina Poultry Power	11	\$38,600,000.00	2	Pitt
Cascades Moulded Pulp, Inc.	66	\$58,000,000.00	1	Scotland
Case Farms Inc	44	\$49,385,688.00	2	Wayne
Caterpillar (GCF-61)	40	\$15,000,000.00	2	Lee

Entity	Jobs Announced	Capital Investment Announced	Tier	County
Chase Corp	25	\$645,000.00	2	Caldwell
Chatsworth Products Inc	15	\$927,000.00	2	Craven
Church & Church Lumber Co	10	\$644,151.00	1	Wilkes
Comfort Bilt LLC	17	\$538,001.00	2	Davie
Corvid Technologies, LLC	367	\$28,960,200.00	3	Iredell
CYES Factory LLC	12	\$535,000.00	2	Stanly
Dentsply Sirona	320	\$3,000,000.00	3	Mecklenburg
Direct Pack, Inc.	40	\$1,963,146.00	1	Richmond
EG Industries (FPE NC)	12	\$367,464.00	2	Randolph
Enforge LLC	44	\$4,122,606.00	2	Stanly
ERA Polymers	20	\$9,200,000.00	2	Gaston
Gaia Herbs, Inc.	33	\$23,650,000.00	2	Transylvania
Geodynamics LLC	14	\$2,150,000.00	3	Carteret
Grass America Inc	44	\$31,150,000.00	2	Forsyth
Grover Gaming	13	\$250,000.00	2	Pitt
Haakon Industries	160	\$19,600,000.00	3	Buncombe
Honeywell	750	\$248,000,000.00	3	Mecklenburg
Intermarket Technology, Inc	58	\$2,665,000.00	2	Beaufort
Ipreo Holdings LLC	250	\$1,050,000.00	3	Wake
ITG	137	\$12,000,000.00	2	Catawba
Jackson Corrugated	42	\$11,500,000.00	2	Rutherford
JBB Packaging LLC	50	\$11,900,000.00	1	Halifax
Jetstream Aviation	145	\$10,500,000.00	1	Lenoir
LendingTree	436	\$60,800,000.00	3	Mecklenburg
Liberty Trailers, LLC / Talbert Mfg (DBA Ferree Trailers)	24	\$2,982,741.00	2	Randolph
Longitude 80 Dairies, Inc.	53	\$3,419,878.00	3	Iredell
McGuckin & Pyle	33	\$2,540,000.00	2	Craven
mesur.io	10	\$740,000.00	1	Caswell
Moog Components Group	20	\$1,800,000.00	1	Cherokee
Mountaire Farms of North Carolina	580	\$86,000,000.00	3	Chatham
National General Insurance Co.	626	\$12,263,200.00	2	Forsyth
New York Air Brake	94	\$9,846,692.00	2	Rowan
Newman's Seafood	25	\$2,500,000.00	2	Beaufort
NWL Capacitors	16	\$2,600,000.00	1	Greene

Entity	Jobs Announced	Capital Investment Announced	Tier	County
OneH2, Inc	21	\$32,490,000.00	2	Catawba
Pairwise Plants	201	\$11,200,000.00	3	Durham
PEMMCO Manufacturing, Inc.	20	\$553,000.00	2	Randolph
Pendo.io, Inc.	590	\$34,560,000.00	3	Wake
Plastics Technology Inc. (PTI)	15	\$1,040,000.00	2	Catawba
Polywood Inc.	384	\$35,331,000.00	1	Person
Progressive Rail (Modena Transload)	25	\$4,820,000.00	2	Gaston
Publix Corporate Offices	1,000	\$300,000,000.00	2	Guilford
Quality Enclosures	65	\$3,300,000.00	2	Stanly
Reser's Fine Foods, Inc	79	\$3,245,948.00	1	Halifax
Resistoflex	20	\$4,150,000.00	1	McDowell
Sanritsu Logistics America	24	\$9,000,000.00	2	Rockingham
Santanna Tool & Design LLC (DBA Bulldog Factory Services)	43	\$3,050,000.00	2	Polk
Shurtape Technologies Inc	100	\$31,400,000.00	2	Catawba
Sonic Automotive Inc.	500	\$11,235,257.00	2	Gaston
Southeastern Specialty Vehicles	32	\$842,960.00	1	Vance
Southern Belle Organics	33	\$938,044.00	1	Columbus
Southern Fabricators Inc	33	\$4,814,771.00	1	Anson
Southern Finishing Co Inc	54	\$1,040,940.00	2	Rockingham
Speedline Corp	15	\$2,300,000.00	2	Rockingham
Texture Plus	42	\$1,840,000.00	3	Lincoln
The Clearing House Payments Company	50	\$24,614,000.00	2	Forsyth
Toolcraft Inc of NC	16	\$3,500,000.00	1	McDowell
Trinity Furniture Inc	11	\$254,785.00	2	Randolph
United Chemi-Con Manufacturing	10	\$3,700,000.00	1	Ashe

Companies Not Selecting North Carolina
(Referred in 2018, Announced in 2018)

Entity	Jobs	Capital Investment	Tier(s) Under Consideration	Counties Considered
Amazon	50,000	\$5,000,000,000.00	3	Durham; Wake
Appian Corporation	1,200	\$28,460,000.00	3	Durham; Wake
Axcellerate Pharma, LLC	409	\$142,500,000.00	1	Scotland
Crepini	118	\$9,835,000.00	2	Gaston; Nash
Klöckner & Co SE	1,849	\$46,500,000.00	3	Mecklenburg; Wake
NIPRO Corporation	710	\$163,417,000.00	2; 3	Alamance; Cabarrus; Durham; Franklin; Gaston; Guilford; Johnston; Orange; Rowan; Wake; Wilson
Not Disclosed	720	\$85,000,000.00	1; 2; 3	Alamance; Chatham; Durham; Franklin; Granville; Johnston; Lee; Orange; Vance; Wake; Wilson
Nutramax	225	\$20,000,000.00	1; 2; 3	Alexander; Anson; Burke; Cabarrus; Catawba; Cleveland; Davidson; Davie; Forsyth; Gaston; Iredell; Mecklenburg; Randolph; Rowan; Rutherford; Stanly; Union; Wilkes; Yadkin
OKIN BPS	1,464	\$26,465,000.00	3	Wake
Raytheon Company	1,250	\$10,000,000.00	2	Forsyth; Guilford
Roivant Sciences	222	\$8,350,000.00	3	Durham
SELIT GmbH	100	\$56,936,000.00	2	Alamance; Guilford; Randolph
Servicemac LLC	1,000	\$16,000,000.00	2; 3	Cabarrus; Gaston; Lincoln; Mecklenburg
Technical Youth LLC	200	\$418,300.00	3	Mecklenburg
TouchPoint Medical	240	\$20,000,000.00	3	Durham; Wake
Trina Solar	264	\$11,000,000.00	1; 2	Cumberland; Person; Robeson
United Lens Company	138	\$25,000,000.00	2; 3	Cabarrus; Catawba; Davidson; Durham; Forsyth; Gaston; Guilford; Iredell; Johnston; Lincoln; Mecklenburg; Person; Wake

Companies Still Considering a North Carolina Location, as of February 4, 2018

Tier	No. of Projects	Jobs	Investment
Tier 1	12	460	\$70,280,400.00
Tier 2	15	2,600	\$772,981,981.00
Tier 3	16	5,463	\$1,734,471,017.00
Tiers 1, 2	2	170	\$9,295,219.00
Tiers 2, 3	4	1,063	\$130,275,000.00

Attachment 4

Issues of Non-Compliance by the EDPNC and Response from Commerce in CY 2018

Date	Instance of Non-Compliance	Commerce Response
September 1, 2018	Failure to provide to Commerce an Annual Certification of compliance with the contract and enabling legislation as required by G.S. 143B0431.01(e)(12) and the contract. EDPNC provided their Annual Certification when made aware of the noncompliance.	Counseled EDPNC leadership to meet Annual Certification deadlines as required by the contract.
November 7, 2018	The Annual Certification ultimately provided to Commerce of failed to disclose that the composition of EDPNC's governing board did not meet those required under G.S. 143B-413.01(d)(2).	Counseled EDPNC leadership to provide a full explanation of any issues of noncompliance with as required by the Annual Certification going forward.

Attachment 5

Listing of Each Person or Entity Solicited for Funds by the Secretary of Commerce on Behalf of the EDPNC in CY 2018

Date	Entity	Amount of Funds Donated
None	None	None

Attachment 6

Listing of Gifts/Contributions Received by the EDPNC by Entity Receiving Award from Commerce in CY 2018*

Name of Entity	Amount of Gift	Amount of Award
None	None	None

** This does not include local governments through which awards for some programs flow.*