



FAIRFAX COUNTY
ECONOMIC DEVELOPMENT AUTHORITY



FAIRFAX COUNTY ECONOMIC RECOVERY FRAMEWORK

PREPARED FOR: FAIRFAX COUNTY & FAIRFAX COUNTY ECONOMIC DEVELOPMENT AUTHORITY

PREPARED BY: HR&A ADVISORS, INC.

JANUARY 2021

HR&A
Analyze. Advise. Act.

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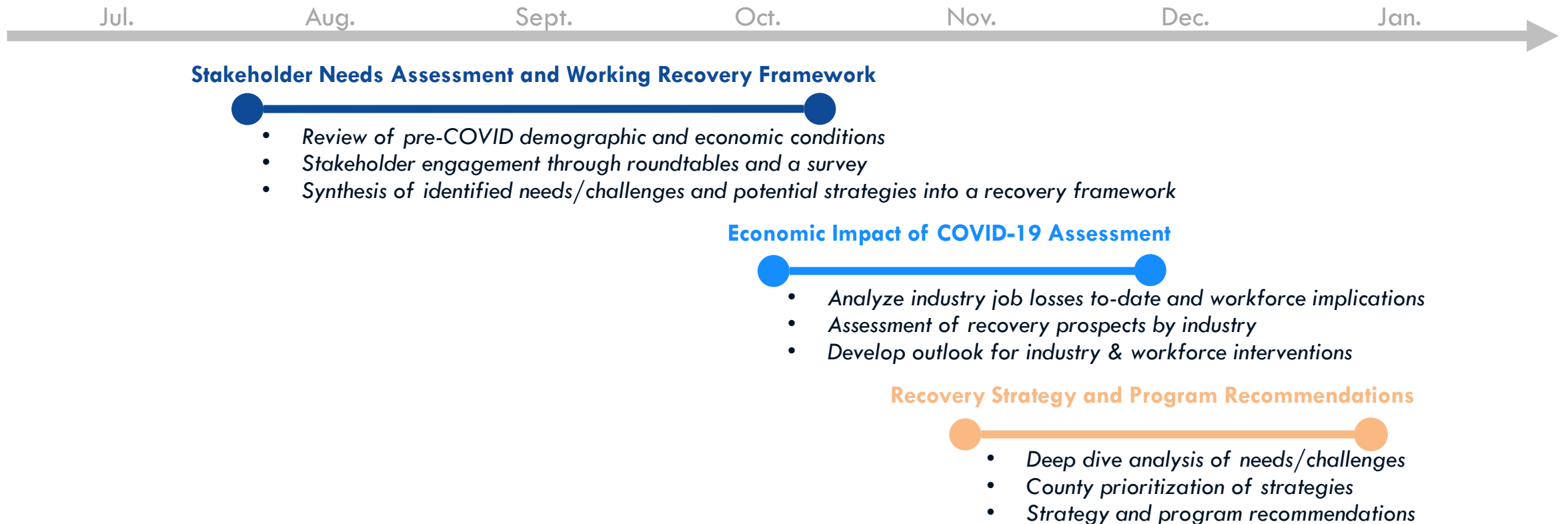
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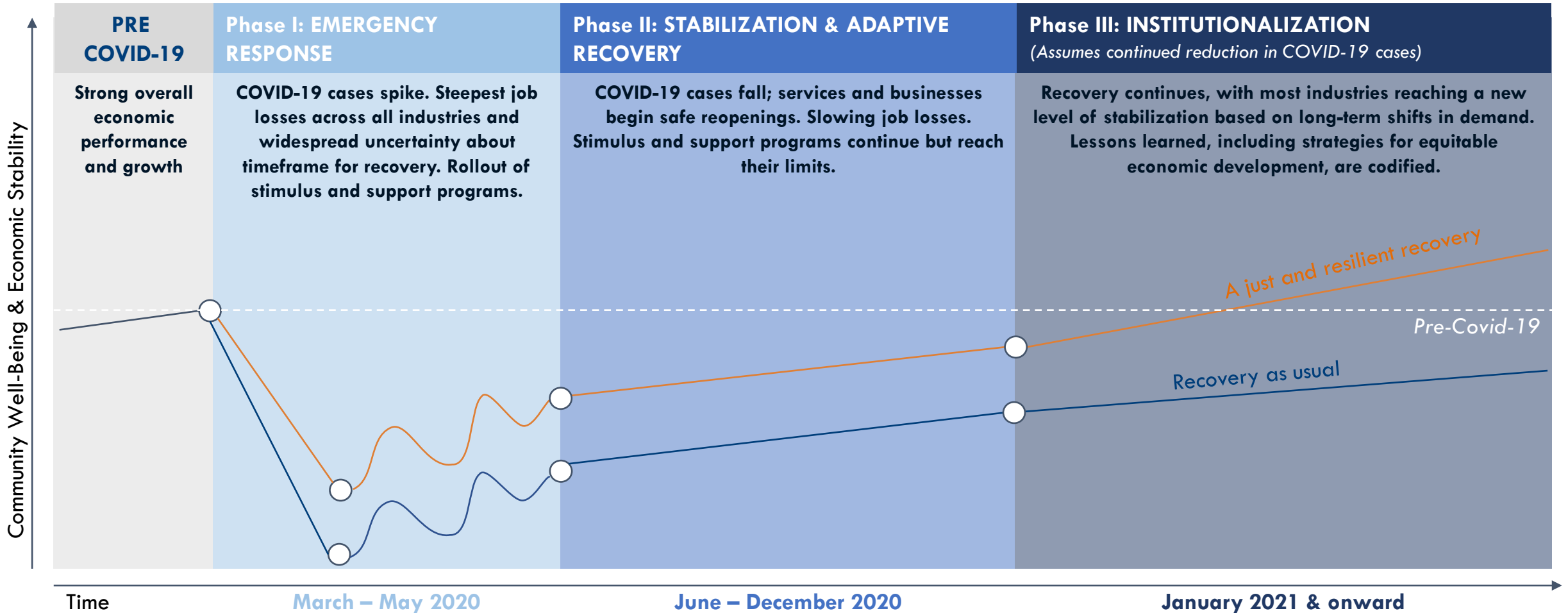
STUDY OVERVIEW & SCOPE

HR&A was engaged by Fairfax County (the County) and the Fairfax County Economic Development Authority (FCEDA) to support development of an economic recovery framework in the wake of the COVID-19 pandemic. This framework identifies the county's key needs and challenges and makes recommendations for fostering an equitable, inclusive recovery based on stakeholder input, analysis, and best practices. This framework is primarily focused on the recovery of, and support for, jobs, businesses, and workers and is intended to be implemented over the next 12-18 months. Many recommendations that would begin within that timeframe would continue into the future, initially serving as tools for the County's pandemic recovery, and then to build long-term economic resilience.



STUDY APPROACH

Fairfax County’s rate of recovery will depend on many factors and, like all other regions in the country, recovery will unfold in phases. The county’s recovery trajectory from here on out will depend on whether County leadership follows a typical path to recovery or uses this as a moment to intentionally chart a course toward a more just and resilient future.

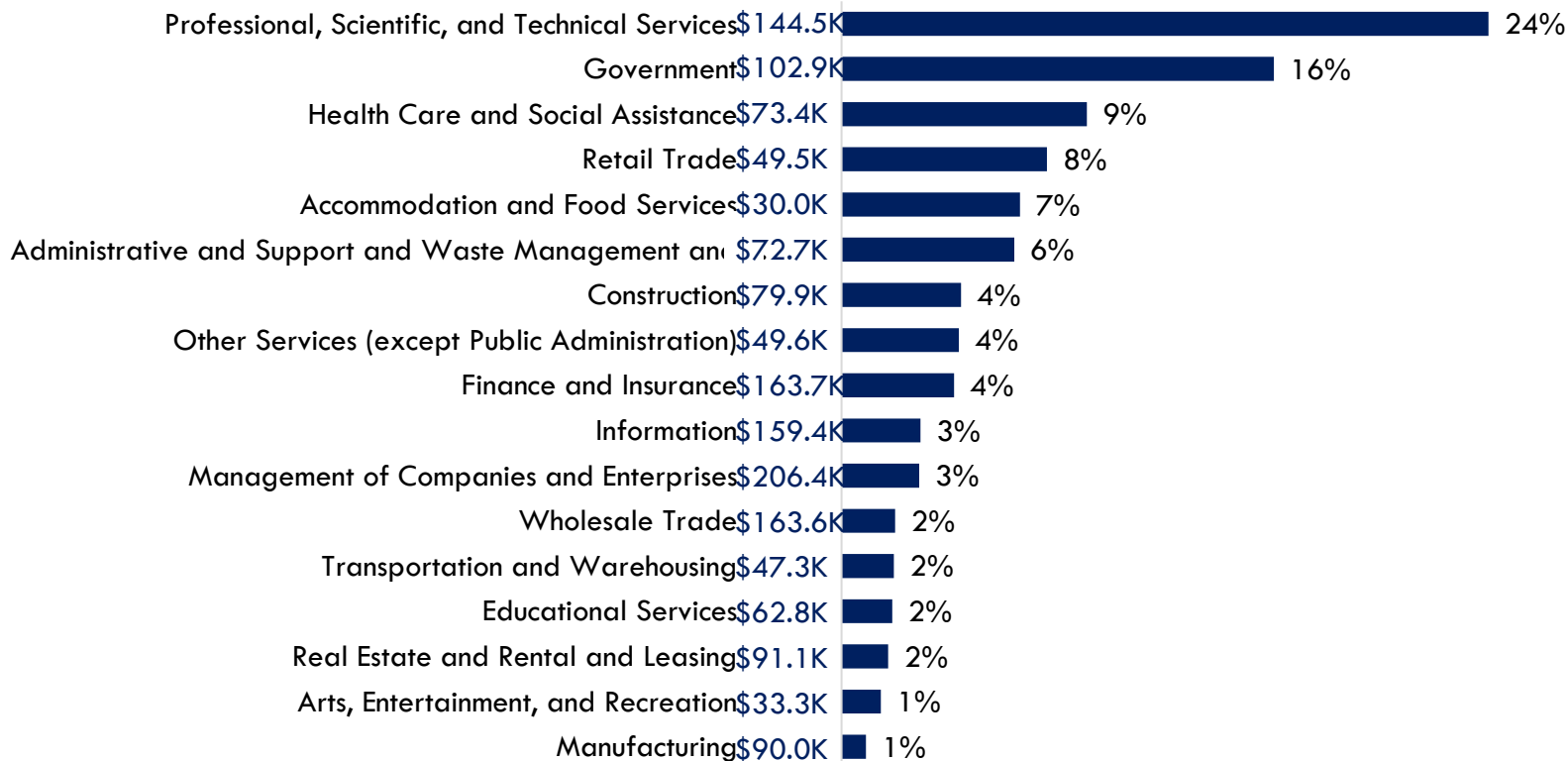


THE PRE-PANDEMIC ECONOMY

Fairfax County had experienced a decade of strong economic growth prior to the pandemic. Since 2010, total jobs grew by 9% annually to over 700,000 jobs in 2019, employment had fallen to the lowest level since the Great Recession, and in 2018, the county had the 3rd highest median household income in the Washington, D.C. MSA. As of 2019, over a third of jobs in Fairfax County were in industries with average wages over the median household income. However, data also shows significant disparities in economic success by race.

EMPLOYMENT BY INDUSTRY (2019)

Average annual wage, % share of total jobs



PRE-PANDEMIC ECONOMIC CONDITIONS

701,825 jobs, 2019

2.3% unemployment, 2019

\$122k median household income, 2018

\$140k median income for White households, 2018

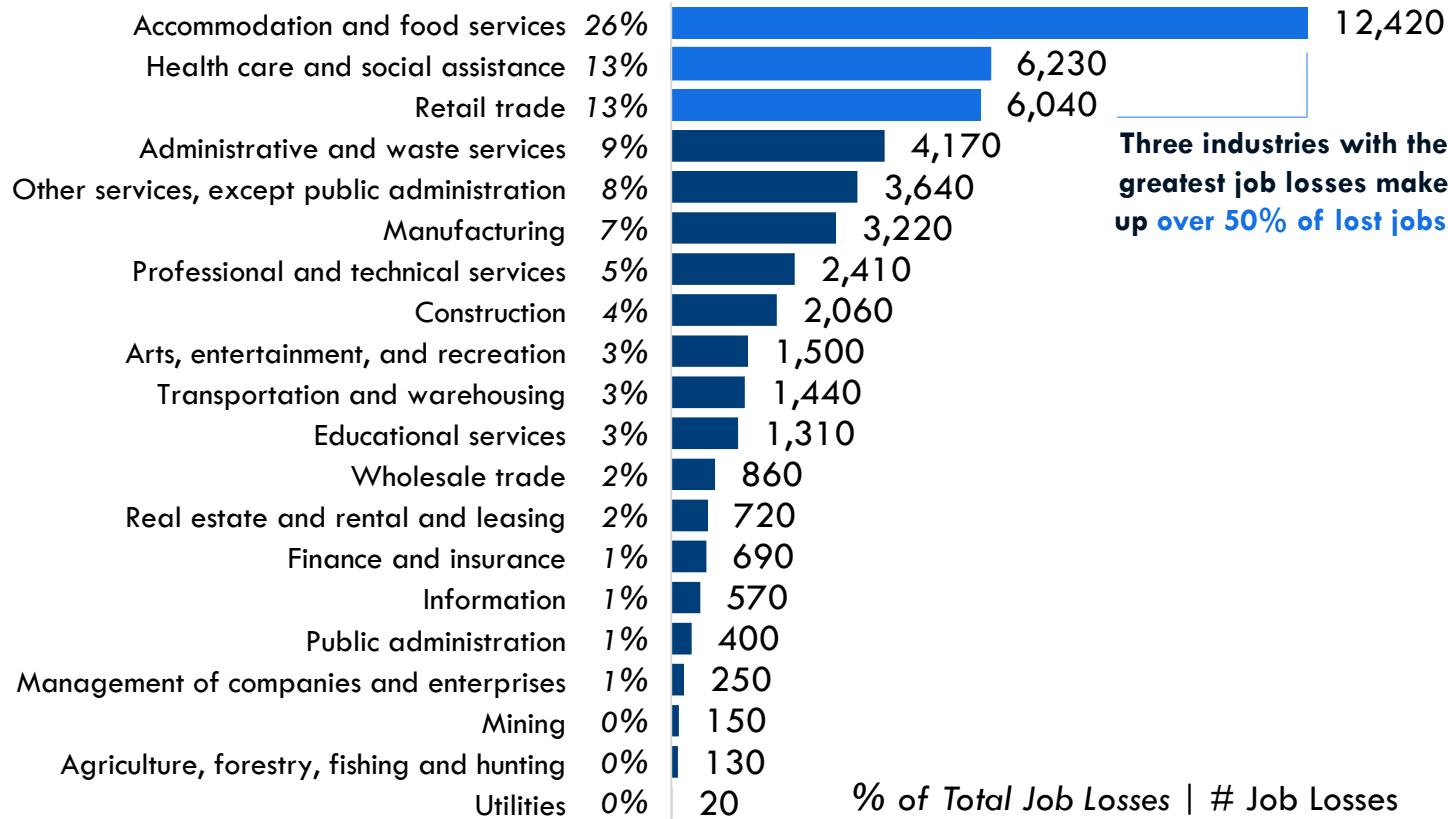
\$86k median income for Black households, 2018

\$81k median income for Hispanic households, 2018

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

Fairfax County lost an estimated 48,200 jobs (through December 2020) and employment losses were heavily concentrated in food service, hospitality, and retail sectors. The distribution of job losses disproportionately impacts certain populations – those who are low-income, people of color, and people with relatively low levels of formal education and training. Job loss due to the pandemic compounds pre-existing inequities, making the road to economic stability longer and more challenging for these workers.

PROJECTED JOB LOSSES THROUGH DECEMBER 2020



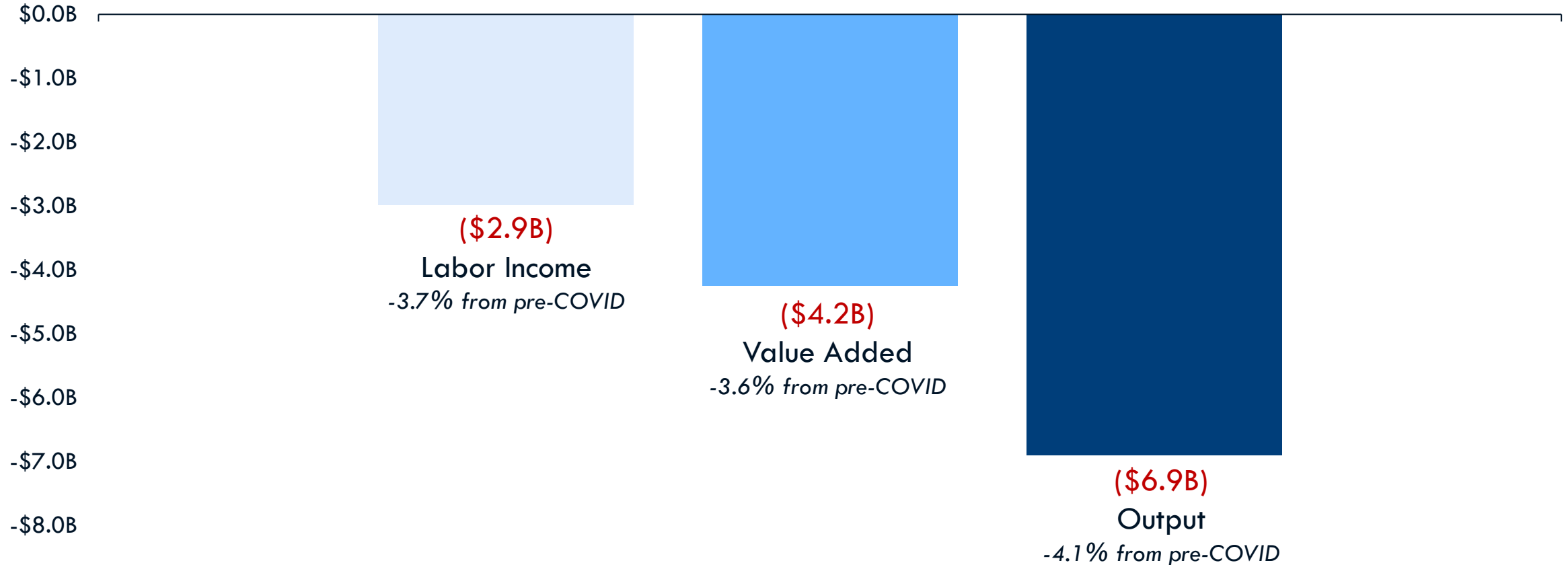
DISPARATE IMPACTS

- 90%** Of all job losses took place in industries with average wages less than 80% AMI
- 63%** Of all job losses took place in industries with higher than avg. representation of people of color
- 74%** Of all job losses took place in occupations that required a high school diploma or no credential
- 76%** Of all job losses took place in occupations that required short-term or no training

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

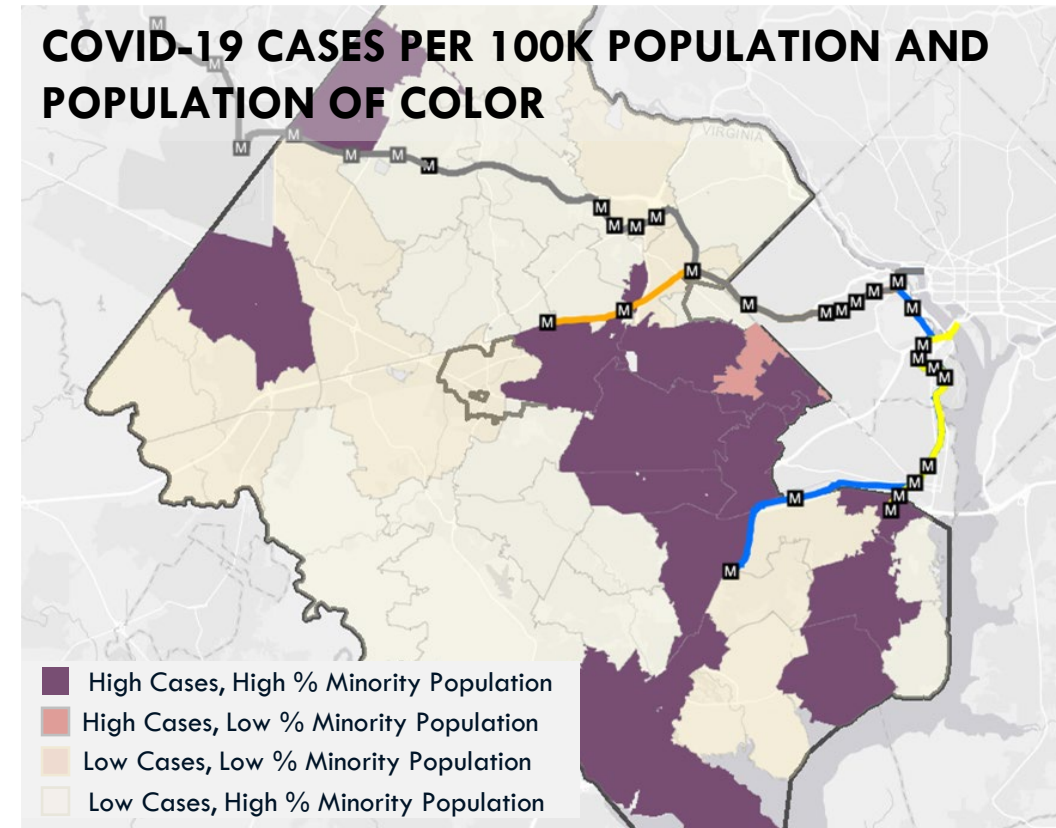
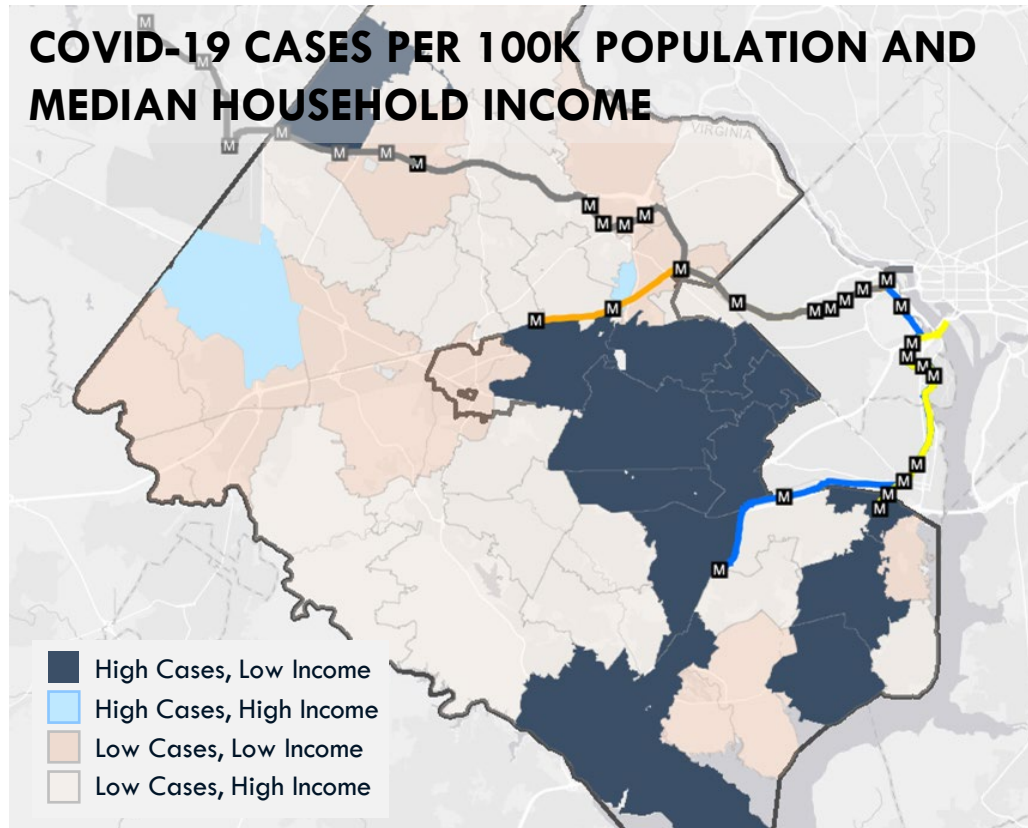
The effects of significant jobs loss, prolonged unemployment, and business closures ripple through the regional economy and are reflected in lost earnings among workers (labor income), lost gross regional product (value added), and lost value of goods and services produced (output).

TOTAL REGIONAL IMPACTS ON LABOR INCOME, VALUE ADDED, REGIONAL OUTPUT



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

In addition to the economic challenges that many workers are now facing due to the pandemic, there are also new and amplified social challenges that have created barriers to recovery. The pandemic did not impact all communities in the county equally and had the greatest impact on minority and low-income communities.



*COVID-19 Cases by Zip Code data retrieved early October 2020. Data is updated and available [here](#)
Source: Fairfax County Health Department, Fairfax County GIS

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

Through virtual roundtables and responses to an online questionnaire, stakeholders representing 65+ organizations and small businesses surfaced the specific impacts of the pandemic on business owners, workers, and families in Fairfax County, along with perceived barriers to, and strategies for, recovery.



65+

Organizations and Small
Businesses Engaged



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

The challenges summarized below represent stakeholders' near and mid-term concerns. All stakeholders agreed that building toward a “new normal” by addressing pre-existing and new economic and social disparities was an important long-term goal.



IMPACT ON INDUSTRY AND EMPLOYERS

- The pandemic has had disproportionate impacts across industries, with hospitality, food service, and small retailers most heavily impacted and facing the longest trajectory for recovery.
- Consumer and workforce confidence has declined as the pandemic continued, stifling the recovery of centers of commercial activity as shoppers and workers continue to face uncertainty and health risks.
- Stakeholders expressed concern about long-term threats to talent attraction and retention, as recent progress may be interrupted by the pandemic.



IMPACT ON WORKFORCE & POTENTIAL TALENT

- Job losses due to the pandemic have disproportionately impacted low-income and minority workers.
- As the economy recovers, the workforce may face changes in sought-after skills and job opportunities requiring new or different qualifications. For some workers, skills are not immediately transferrable and will require adjustments.
- County HHHS agencies, non-profit service providers and public education institutions have felt a strain as they seek to provide services online and, for service providers, manage an expanded client base including newly vulnerable individuals and families.
- Barriers to economic opportunity, including inequitable digital access & digital literacy, inadequate childcare access & affordability, and disparate health impacts, have been exacerbated.

RECOMMENDATIONS | Summary

The following recommendations respond to the impacts of the COVID-19 pandemic on businesses and services providers throughout the county and are aimed at supporting recovery as well as strengthening businesses and non-profits to be able to withstand future shocks and stresses. “**First moves**,” the highest priority initiatives with potential to be deployed rapidly, are indicated in **bold** text.



Business Recovery & Resilience

Launch targeted small business recovery & resilience programs focused on delivering technical support to small businesses in the industries and communities most impacted by the pandemic.

Roll out a dynamic “buy local” campaign for small businesses throughout the county, focused on goods Made in Fairfax and elevating minority-owned businesses.

Identify strategies to reduce small and local business costs, including through engagement with private-sector landlords and lenders.



Regulatory Action

Continue to improve the online permitting process, particularly for commercial users making pandemic-related improvements.

Continue advocating for legislation that prioritizes: i) local purchasing, and ii) procurement from minority-owned businesses.

RECOMMENDATIONS | Summary

A just recovery must also provide support directly to workers and families who have been directly impacted by the pandemic. The strategies below are focused on linking job seekers to employment opportunities now, strengthening countywide resources for job training and reskilling, and supporting families who are struggling to engage in the economy. “**First moves,**” the highest priority initiatives with potential to be deployed rapidly, are indicated in **bold** text.



Workforce & Talent Support

Leverage County resources to link job seekers with employment opportunities by:

- 1. Hiring local workers to support pandemic recovery efforts**
- 2. Strengthening job training and placement programs, focusing on individuals & communities impacted by the pandemic**

Coordinate improvements to certification and skills-based job training and reskilling programs and bring these opportunities to low-income communities and communities of color.

Pilot a neighborhood job and entrepreneur center, building toward a long-term investment strategy to be deployed throughout the County.



Support for Workers & Families

Expand access to affordable childcare to enable more parents, particularly women, to take part in the workforce.

Partner with internet service providers to ensure that all Fairfax County residents can access affordable internet service and expand reach of County digital literacy programs, a key to accessing economic opportunities.

Create efficient and integrated client-facing access to Fairfax County and partner-provided health, housing, and human services.

Commitment to and Implementation of Affordable Housing Production Goals.

RECOMMENDATIONS | Summary

As the public health crisis lifts, well-positioned commercial corridors and districts can be engines for economic recovery. At the same time, support for struggling commercial corridors will be essential for community recovery. The following recommendations respond to these needs and opportunities as the County looks past recovery to stabilization.

»» Physical & Community Planning

Support corridor-level recovery by establishing “boots on the ground” corridor teams to provide day to day support to businesses.

Strategically employ a Health in All Policies approach to community development.

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THE PRE-PANDEMIC ECONOMY

In the decade leading up to 2020, Fairfax County had experienced strong economic growth. The total number of jobs in the county grew by 9.0% per year to 701,825 jobs in 2019, and unemployment fell to 2.3%, the lowest level since the Great Recession. In 2018, the county had the 3rd highest median household income in the Washington D.C. MSA, reaching \$122,230, a 19% increase over the median household income in 2010.

701,825

jobs, 2019

\$122,230

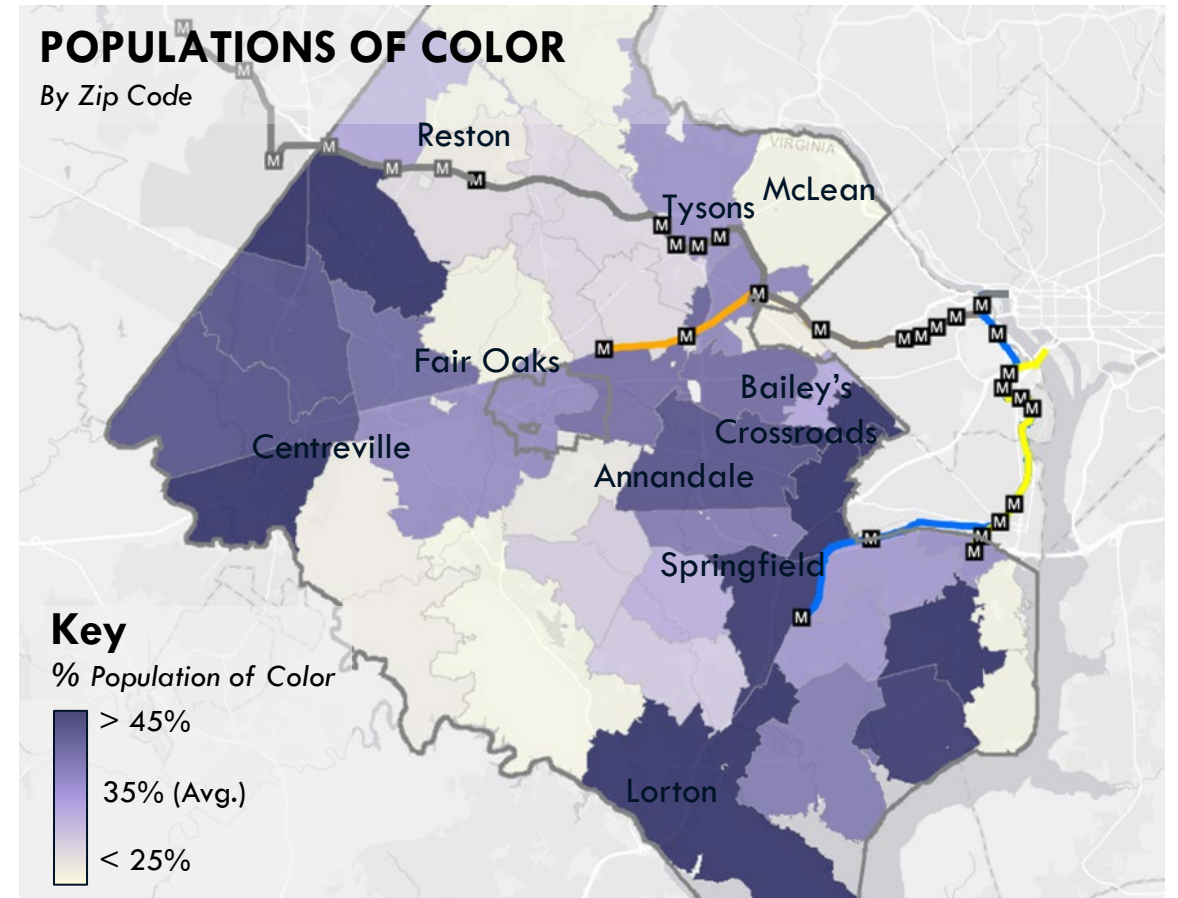
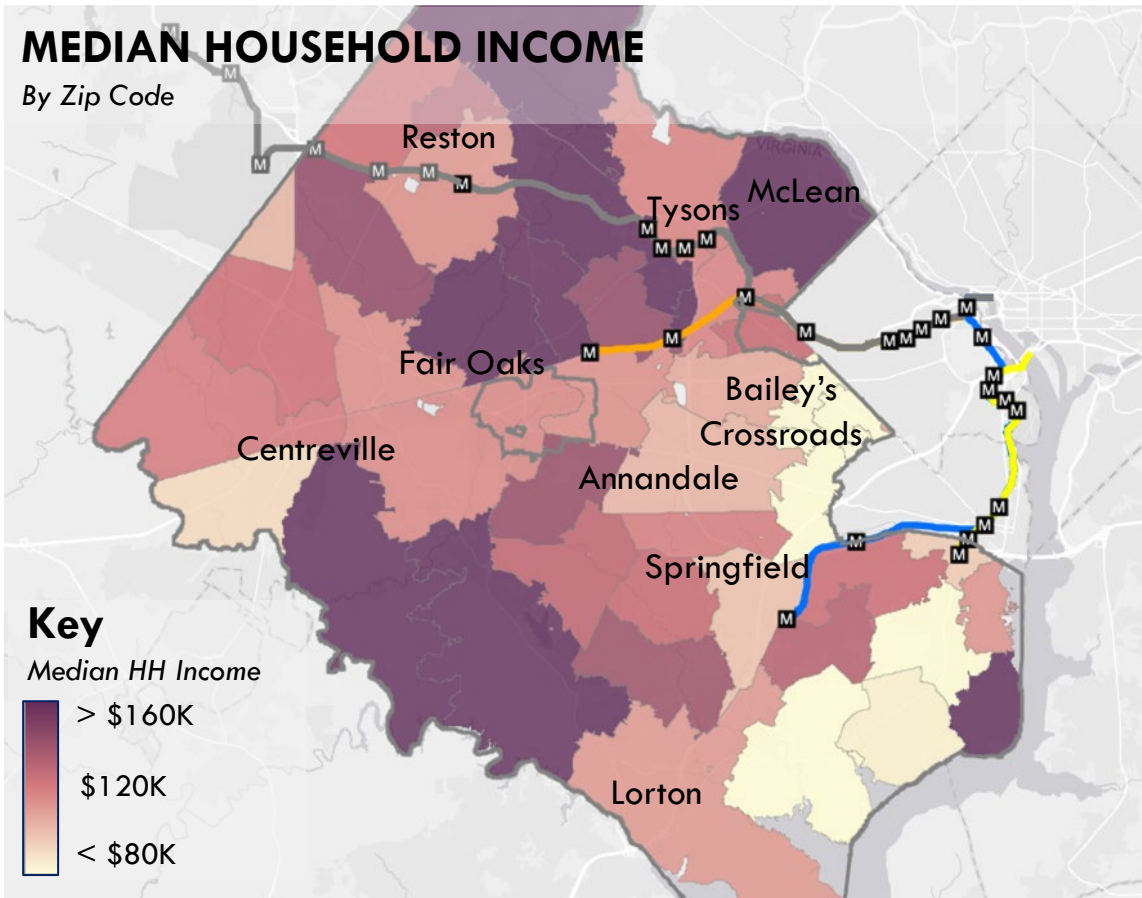
median household income, 2018

2.3%

unemployment, 2019

THE PRE-PANDEMIC ECONOMY

However, median household income varied by race. Median household income of white households (~\$140,000) was 1.6x greater than Black households (~\$86,000) and 1.7x greater than the median household income of Hispanic and Latinx households (~\$81,000). Variation in median household income also aligns with density of populations of color across the county, as shown below. In combination, this data indicates that Fairfax County residents do not have equitable access to economic success.



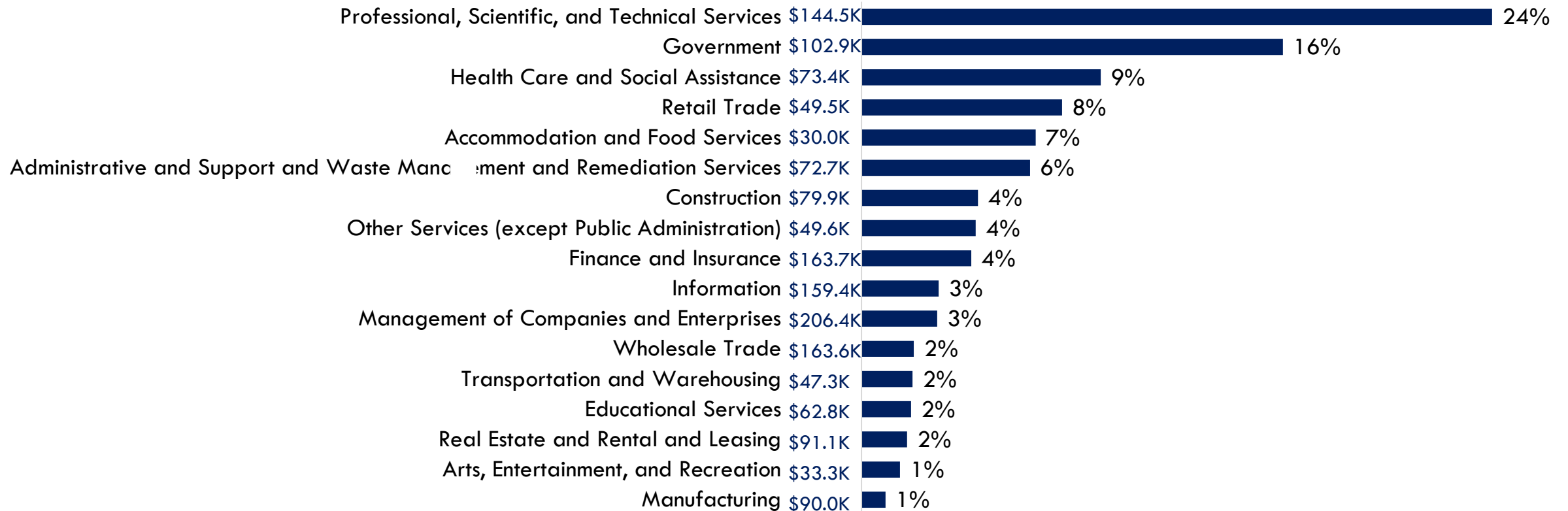
Source: ACS 2017 5-Year Data

THE PRE-PANDEMIC ECONOMY

As of 2019, over a third of jobs in Fairfax County were in industries with average wages over the median household income (\$122,230), with Professional, Scientific, and Technical Services making up almost a quarter of all employment in the county. This reflects the presence of large and small professional and tech-focused companies in the county.

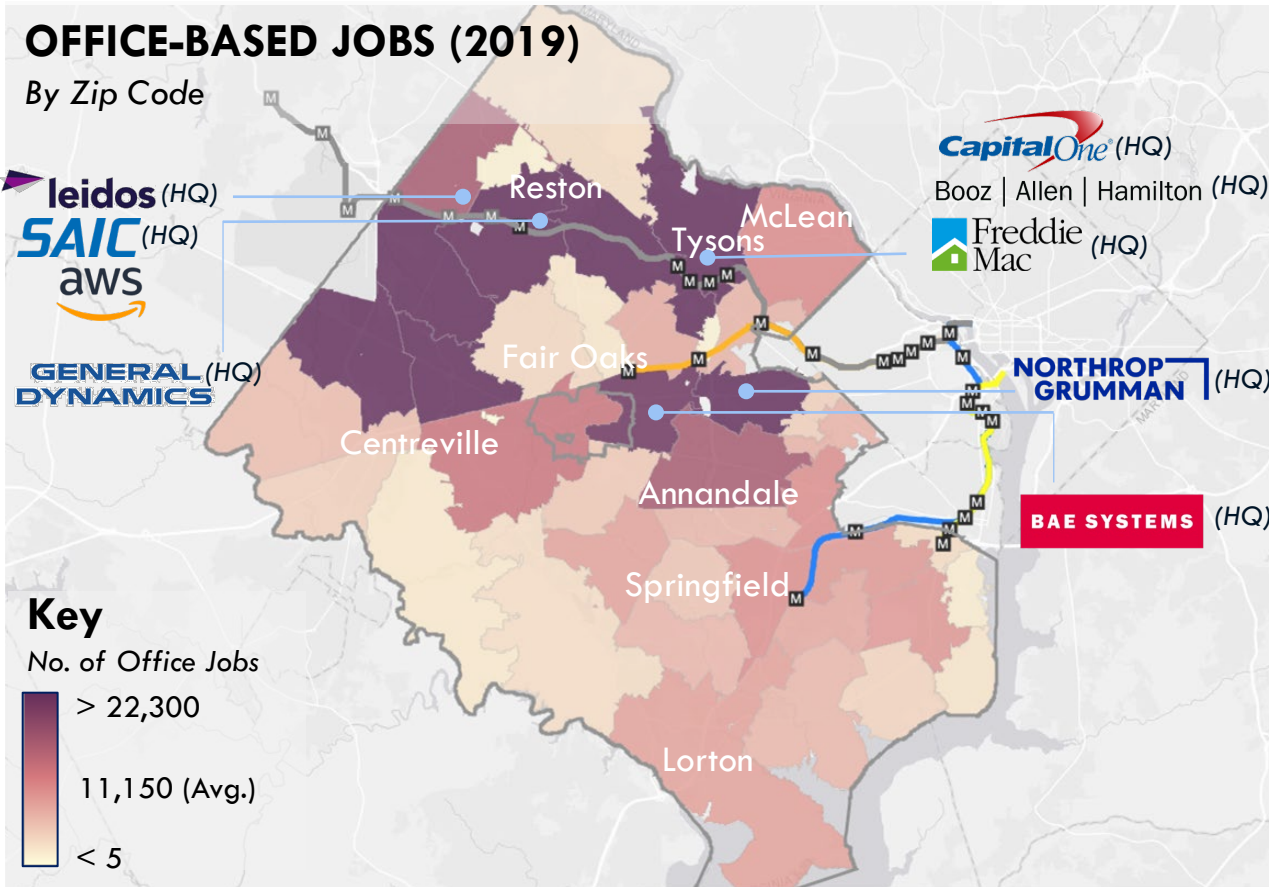
EMPLOYMENT BY INDUSTRY (2019)

Average annual wage, % share of total jobs



THE PRE-PANDEMIC ECONOMY

Investments by major employers supported high-wage jobs and a strong commercial real estate market, as the county's commercial centers fall along the Dulles Technology Corridor (extending from Tysons Corner into Loudon County). In recent years, the expansion of the Silver Line and relocations and expansions of corporate headquarters have strengthened commercial centers.



Source: Emsi, CoStar

MAJOR EMPLOYERS

Sample of HQ relocations and expansions in the county in recent years

	HQ Location	Est. Employees	Year Moved	Office SF
Capital One†	Tysons	7,000	2018	940K
Bechtel Corp*	Reston	1,300	2018	225K
Blackboard*	Reston	350	2019	71K
Appian†	Tysons	750	2020	276K
Leidos†	Reston	1,000	2020	267K
Freddie Mac†	Tysons	2,680	2020	429K
VW North America†	Reston	1,000	2023	196K

*Relocation into the county from elsewhere

†expansion or relocation from within the county.

Other major employers include Accenture, Adobe Systems, AWS, Airbus, BAE Systems, Cisco Systems, Cox Communications, Charter Communications, Dell, Deloitte, Google, Hewlett-Packard, IBM, Oracle Corporation, Verizon, Siemens, Salesforce.com, Raytheon, and others.

THE PRE-PANDEMIC ECONOMY

Additionally, while the county is home to many large employers, the majority of businesses have less than 50 employees, many of which are in industries that have been hard-hit by the economic impacts of the COVID-19 pandemic.

Based on the most recent Census County Business Patterns data, **~8%** of all business establishments in the County have over 50 employees (2018).

Industries with a relatively high concentration of **small business establishments include retail, finance, construction, real estate, accommodation and food services, and health care** – aside from real estate, these industries have been heavily impacted by the pandemic and have a long road to recovery.

Industries with a relatively high concentration of **larger business establishments include management of companies and enterprises, information, and utilities.**

ESTABLISHMENTS BY SIZE WITHIN EACH INDUSTRY (2018)

Ordered by highest to lowest concentration of small businesses

Industry	Less than 50 Employees	More than 50 Employees
Real estate and rental and leasing	98%	2%
Other services (except public administration)	98%	2%
Construction	96%	4%
Finance and insurance	95%	5%
Health care and social assistance	95%	5%
Wholesale trade	93%	6%
Manufacturing	93%	6%
Educational services	92%	8%
Transportation and warehousing	92%	8%
Professional, scientific, & technical services	91%	9%
Accommodation and food services	91%	9%
Retail trade	90%	10%
Arts, entertainment, and recreation	89%	10%
Administrative and support services	87%	13%
Information	83%	17%
Management of companies and enterprises	79%	21%
Agriculture, forestry, fishing and hunting*	N/A	N/A
Utilities*	N/A	N/A

*Incomplete reporting on industry size across all establishments
Source: Census County Business Patterns 2018

PRE-PANDEMIC PRIORITIES

The County has included equity as a lens for decision-making about future policies, program, and services. A number of plans and policy frameworks exist to support the County's commitment to addressing racial and social inequities, including those shown below. These plans are also an important part of the groundwork for implementing a just recovery and building a more resilient economy.

Key County Priorities:

One Fairfax

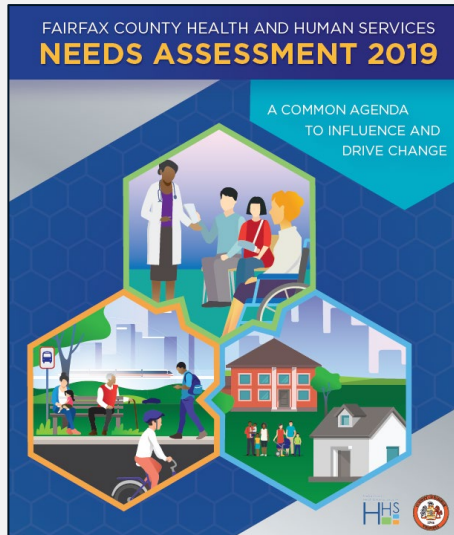


Economic Success Strategic Plan



Fairfax County
Economic Success Strategic Plan
2019 Update

Health and Human Services Needs Assessment



Equitable Growth Profile



Fairfax County Strategic Plan



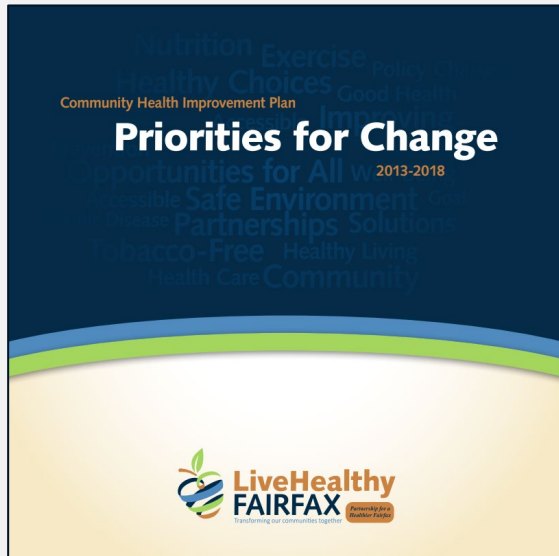
Equity across all decision-making and services, with a focus on continuously offering and improving:

- Economic innovation and opportunities
- High quality education
- Quality infrastructure
- Placemaking
- Governance and financial stewardship
- Affordable housing

PRE-PANDEMIC PRIORITIES

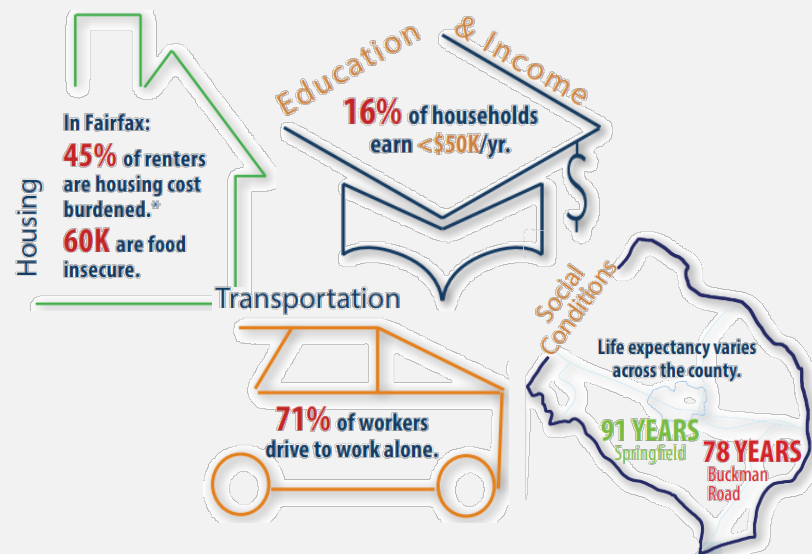
In the Community Health and Improvement Plan, the County began to prioritize a Health in All Policies approach to decision making, which accounts for potential health impacts at all stages of the policymaking process. This is an important pillar of the County's economic recovery from the COVID-19 pandemic, as physical health is linked to mental, social, and economic wellbeing. The recommendations in this study continue to prioritize this approach by incorporating strategies that address social determinants of health, such as access to economic opportunity and strength of community infrastructure.

Health in All Policies Objectives in Fairfax County:



Community Health Improvement Plan – Priorities for Change

Health in All Policies in Fairfax
Health is not merely the absence of disease or sickness – it is a state of complete physical, mental, social, and economic wellbeing.

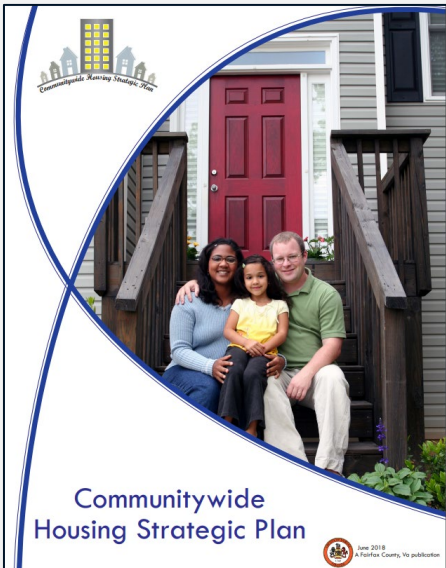


- Promote availability of healthy, affordable housing
- Utilize health and demographic data to prioritize policies that account for individuals' and families' complete financial picture
- Ensure access to education resources
- Promote equitable development to build wealth
- Invest in active, accessible, affordable, and reliable modes of transportation
- Use planning, zoning, and economic development tools to promote equitable opportunities

PRE-PANDEMIC PRIORITIES

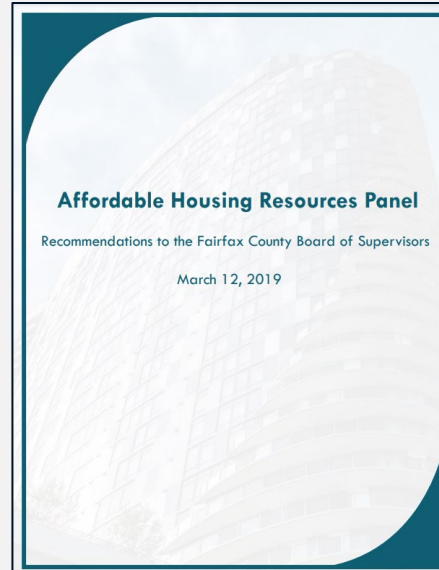
While this study's primary focus is on the pandemic's impact on jobs and workers, addressing the county's housing needs will also be essential to recovery. The long-term loss of employment caused by the pandemic, particularly in low-paying service sector jobs, may lead to housing instability across the county. The County has already committed to many policies and strategies focused on providing more affordable housing to residents, which can be leveraged as part of the recovery process. In the near-term, the County should also prepare for how it may use and distribute funding to support renters and homeowners, and in the long-term, the lasting impacts of the pandemic may also require further assessment of approaches to address housing need.

Key Existing Housing Plans and Strategies:



Community Wide Housing Strategic Plan

- Examine the FCRHA's deep subsidy programs to better align resources to serve those most in need.
- Create guidelines for adaptive reuse of commercial space for affordable housing.
- Dedicate resources to expand the scope of local rental housing subsidy.



Affordable Housing Resources Panel

- Goal to produce at least 5,000 new homes affordable to households earning up to 60% AMI over the next 15 years.
- Recommendation for the Board of Supervisors to commit an additional penny on the real estate tax rate to support the production of this affordable housing.

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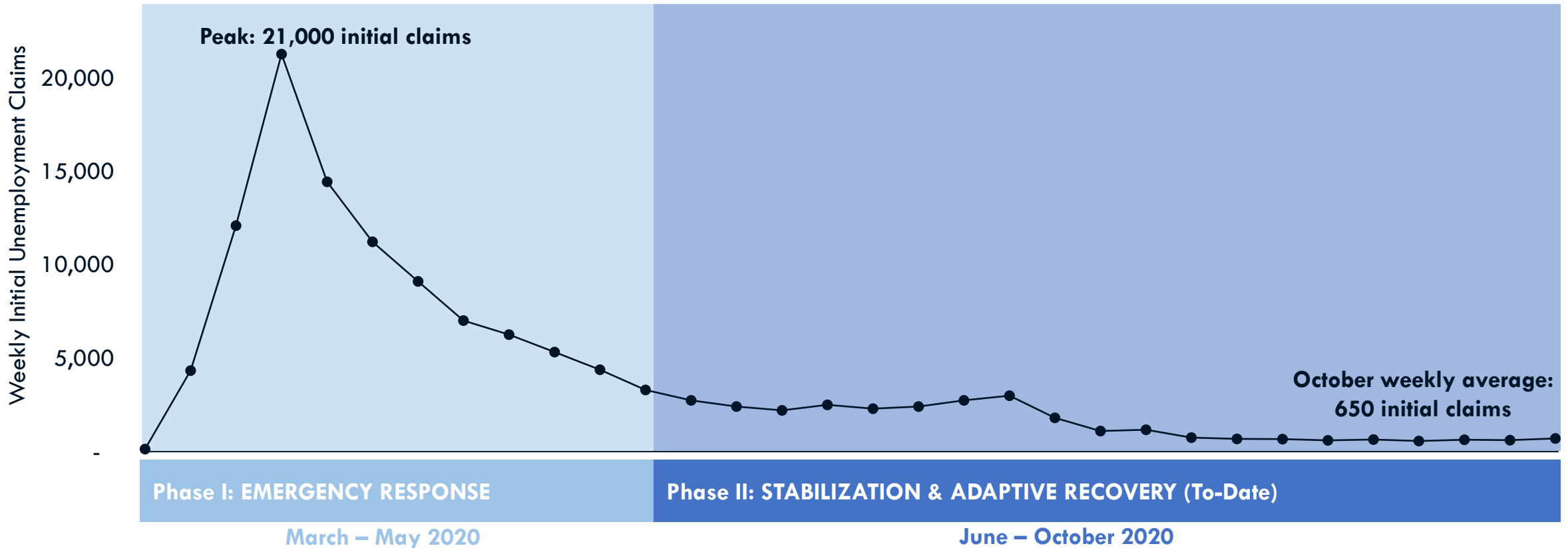
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ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

As it did across the country and in many places around the world, the COVID-19 pandemic created a significant disruption in Fairfax County's economy. Between March and October 2020, 130,000 initial unemployment claims were filed in Fairfax County, peaking during the week of March 29th. While initial claims declined through the summer and fall, as of October 2020 they remained 4.3x higher than the average week pre-pandemic.

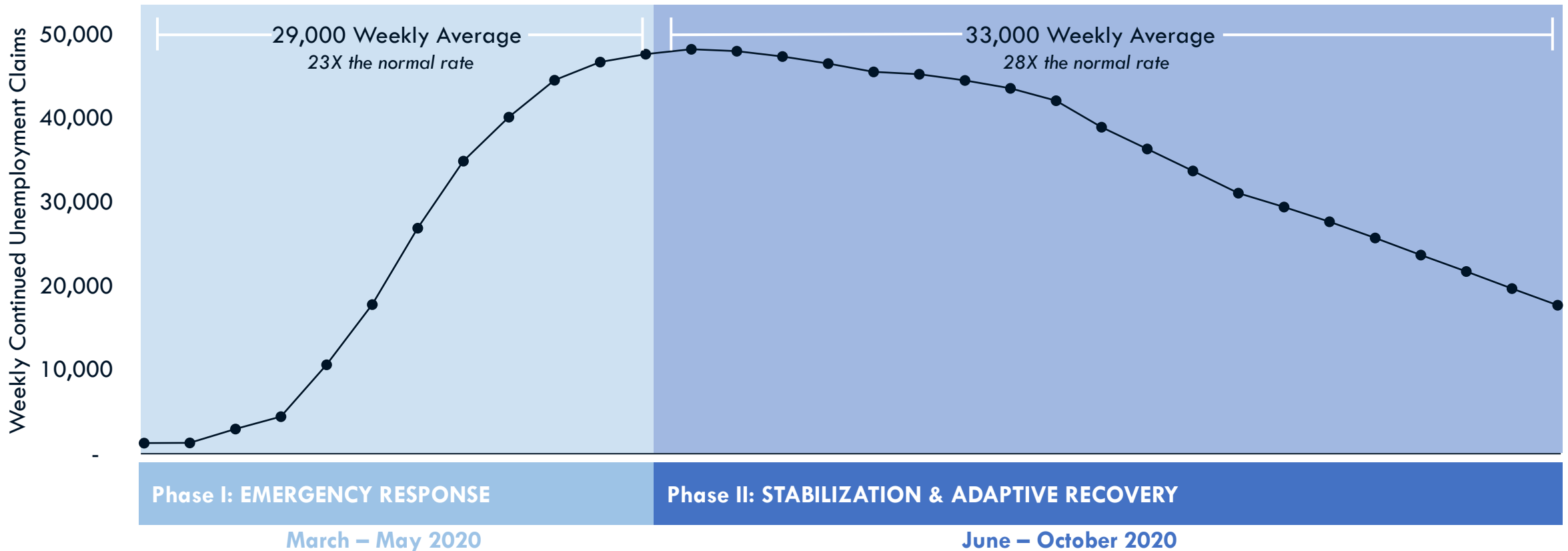
FAIRFAX COUNTY INITIAL WEEKLY UNEMPLOYMENT CLAIMS



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

The total number of Fairfax County individuals who remain unemployed and continue to claim benefits after the initial filing increased rapidly during Phase I reaching 50,000 at its peak. During Phase II, continued claims from June through October have averaged around 33,000 per week, 28x the normal rate, with a continuous decline to date.

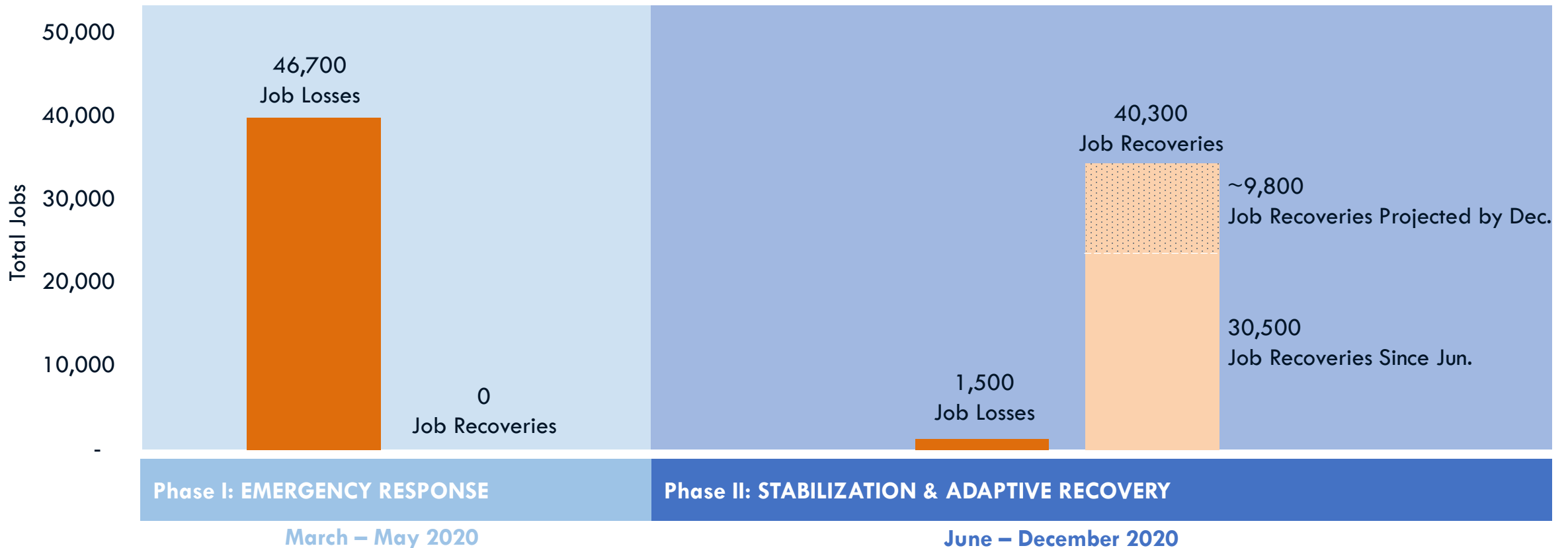
FAIRFAX COUNTY CONTINUED UNEMPLOYMENT CLAIMS



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

Fairfax County experienced a sustained job loss of approximately 48,200 jobs (estimated through December 2020). The county has regained 30,500 jobs and, if recovery continues at this pace, will have recovered another 9,800 jobs at the end of 2020. At the same time, these projections indicate that the labor force shrunk by approximately 8,000 workers between December 2019 and the same month in 2020, and unemployment remains above 3%, which is higher than the prior year's levels.

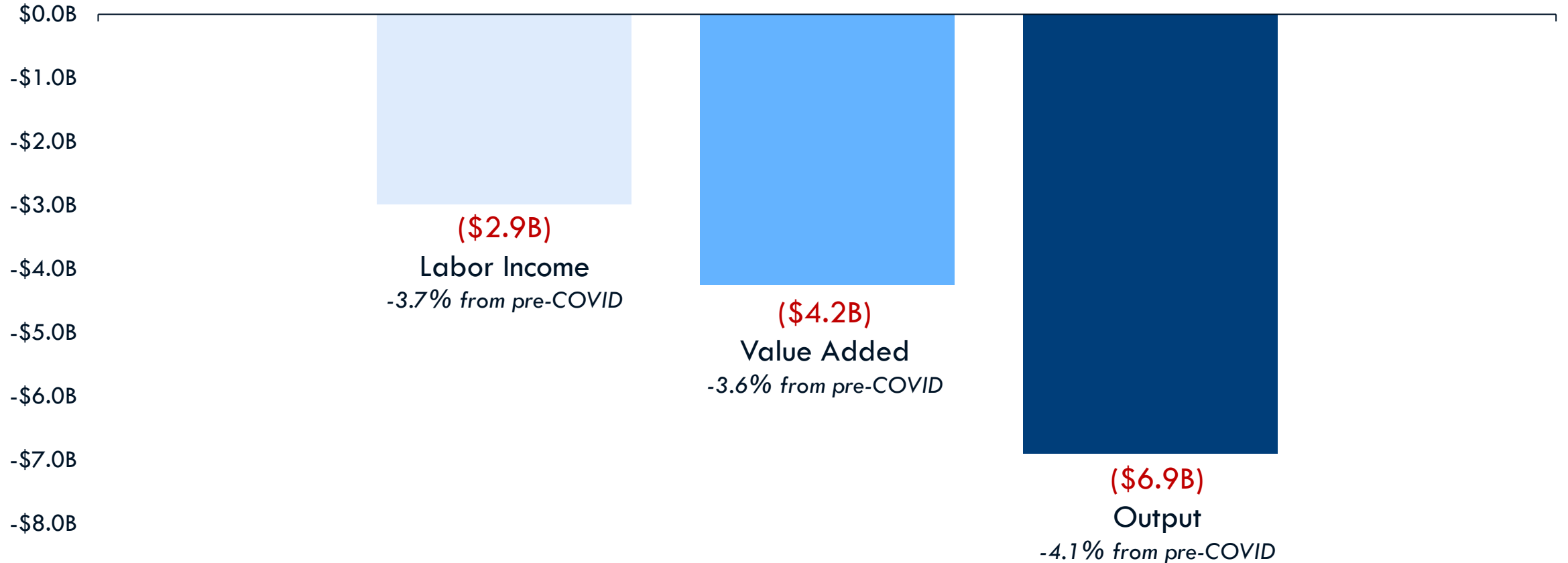
FAIRFAX COUNTY PROJECTED JOB LOSSES & JOB RECOVERIES



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

The effects of significant jobs loss, prolonged unemployment, and business closures ripple through the regional economy and are reflected in lost earnings among workers (labor income), lost gross regional product (value added), and lost value of goods and services produced (output).

TOTAL REGIONAL IMPACTS ON LABOR INCOME, VALUE ADDED, REGIONAL OUTPUT



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

The challenges summarized below represent stakeholders' near and mid-term concerns. All stakeholders agreed that building toward a “new normal” by addressing pre-existing and new economic and social disparities was an important long-term goal.



IMPACT ON INDUSTRY AND EMPLOYERS

- The pandemic has had disproportionate impacts across industries, with hospitality, food service, and small retailers most heavily impacted and facing the longest trajectory for recovery.
- Consumer and workforce confidence has declined as the pandemic continued, stifling the recovery of centers of commercial activity as shoppers and workers continue to face uncertainty and health risks.
- Stakeholders expressed concern about long-term threats to talent attraction and retention, as recent progress may be interrupted by the pandemic.



IMPACT ON WORKFORCE & POTENTIAL TALENT

- Job losses due to the pandemic have disproportionately impacted low-income and minority workers.
- As the economy recovers, the workforce may face changes in sought-after skills and job opportunities requiring new or different qualifications.
- Non-profit service providers and public education institutions have felt a strain as they seek to provide services online and, for service providers, manage an expanded client base including newly vulnerable individuals and families.
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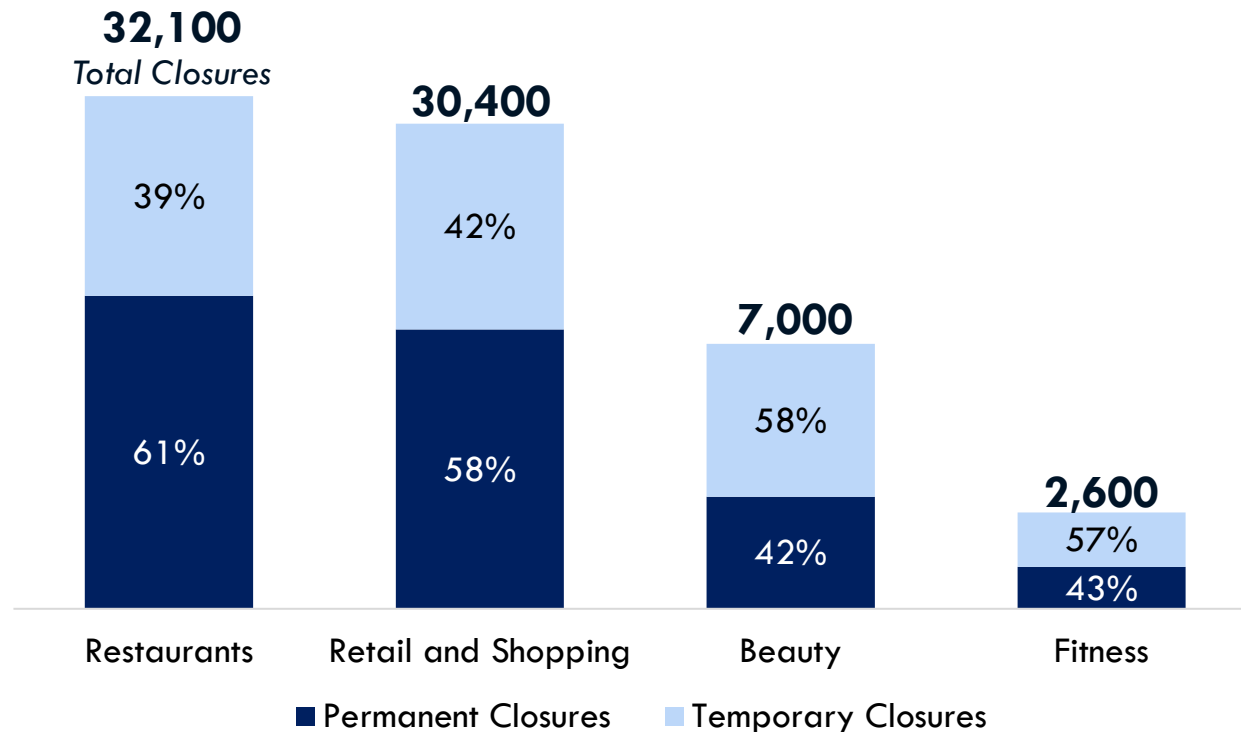
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ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Industry & Employers

Customer-facing businesses – such as retailers, hospitality, and restaurants – are the most vulnerable to closures and losses in revenues as a result of the pandemic. In the Washington D.C. Metro area, 45% of small businesses have closed either temporarily or permanently and for those that remain open, small business revenue is down nearly 55%. Restaurants and retailers are particularly at-risk; over half of closures across the country in these categories at the end of August were permanent.

PERMANENT AND TEMPORARY CLOSURES

Nationwide, March 31 – August 31



PERCENT CHANGE IN OPEN SMALL BUSINESSES

DC MSA, Nov. 25 Compared to Jan. 2020

-45% for All Small Businesses



-67% in Leisure and Hospitality



-23% in Professional & Bus. Services

PERCENT CHANGE IN SMALL BUSINESS REVENUE

DC MSA, Nov. 25 Compared to Jan. 2020

-65% for All Small Businesses



-86% in Leisure and Hospitality



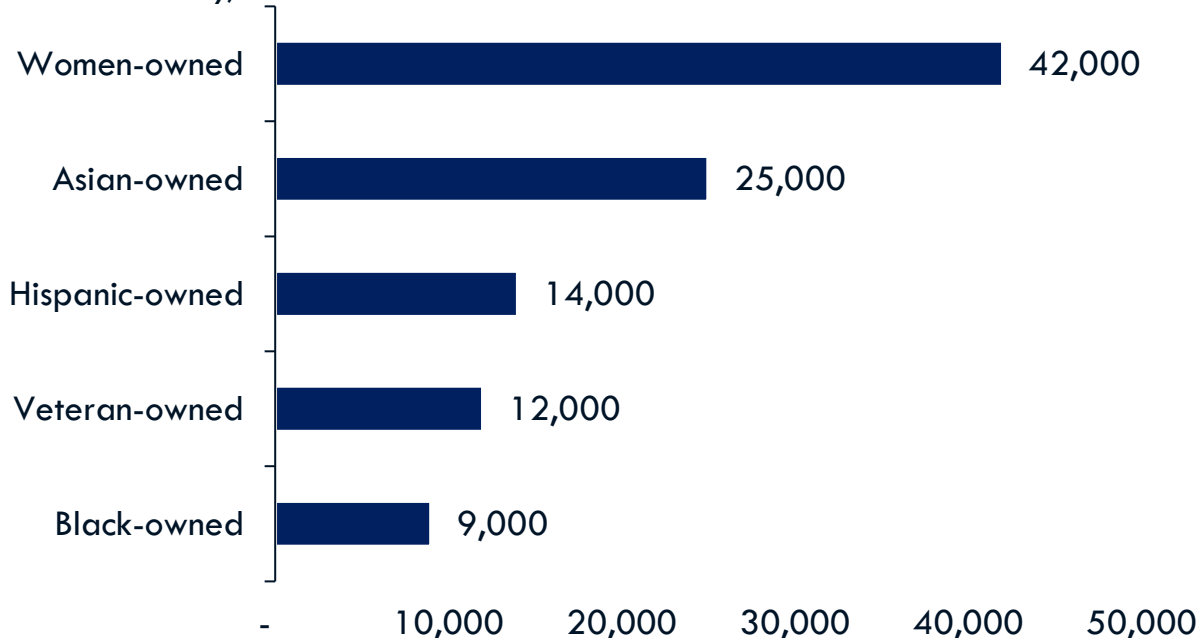
-47% in Professional & Bus. Services

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Industry & Employers

Diverse small businesses, including minority-owned, women-owned, or veteran-owned businesses, are an important part of Fairfax County's economy. MWBE businesses represented 40% of Fairfax County's businesses, together employed 80,000 workers, and generated \$14 billion in annual revenue pre-pandemic. Because of systemic inequities, including access to capital and multi-generational wealth accumulation, minority-owned businesses in particular are struggling to navigate the unprecedented economic pressures created by the COVID-19 pandemic to a greater extent than white-owned businesses. In December, the Community Foundation for Northern Virginia reported that 41% of Black-owned businesses in the region had closed since February compared to 17% of white-owned businesses.

DISTRIBUTION OF MWBE BUSINESSES

Fairfax County, Feb 2020



Source: Fairfax County, Community Foundation Northern Virginia, Brookings Institution

“...There are two small business crises in the United States. The first — the sudden shock to small businesses induced by COVID-19— is acute and immediate...

The second crisis — the structural racial and gender disparities in business ownership — is continuous and long-standing, but equally damaging...

These two crises are interlinked and mutually reinforcing...”

-Sifan Liu & Joseph Parilla (Brookings)

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Industry & Employers

Many employers and industry leaders cited continued decreased worker and consumer confidence as a major challenge to economic recovery as health conditions improve. This is especially challenging for industries and businesses that depend largely on in-person services, such as restaurants and hospitality, and there is little clarity or certainty about when and how workers and consumers will return to offices and shopping destinations. As of the late fall of 2020:

- Residents in Fairfax County were still primarily working remote and spending **48%** less time at their workplaces.
- Residents in Fairfax County were spending **27%** less time visiting retail shops and restaurants.
- Total consumer spending in Fairfax County had decreased by **9%**.
- Total passenger activity was down **64%** at both Ronald Reagan National and Dulles International airports (year-to-date as of August).

**Total consumer spending includes: Entertainment, grocery, health care, restaurants & hotel, retail, and transportation.*

Compared to January 2020 unless indicated; Mobility data is as of Dec. 4; Spending data is as of Nov. 22

Source: The Opportunity Insights Economic Tracker, Google Mobility, US Department of Commerce

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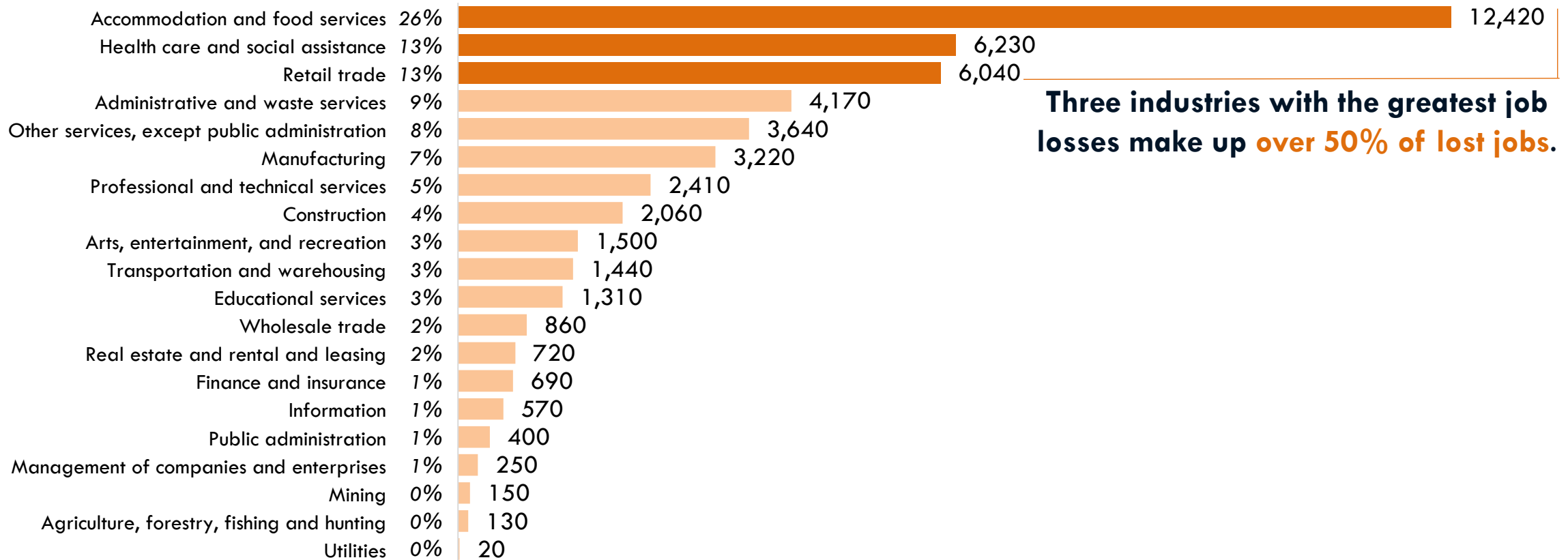
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ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

Food services, hospitality, and retail are among the most impacted industries as illustrated below by job losses. Workers in these industries will have a longer, more uncertain road to recovery than those in industries that experienced a lower loss of employees and business activity (such as Management of Companies/Enterprises, Finance, and Information).

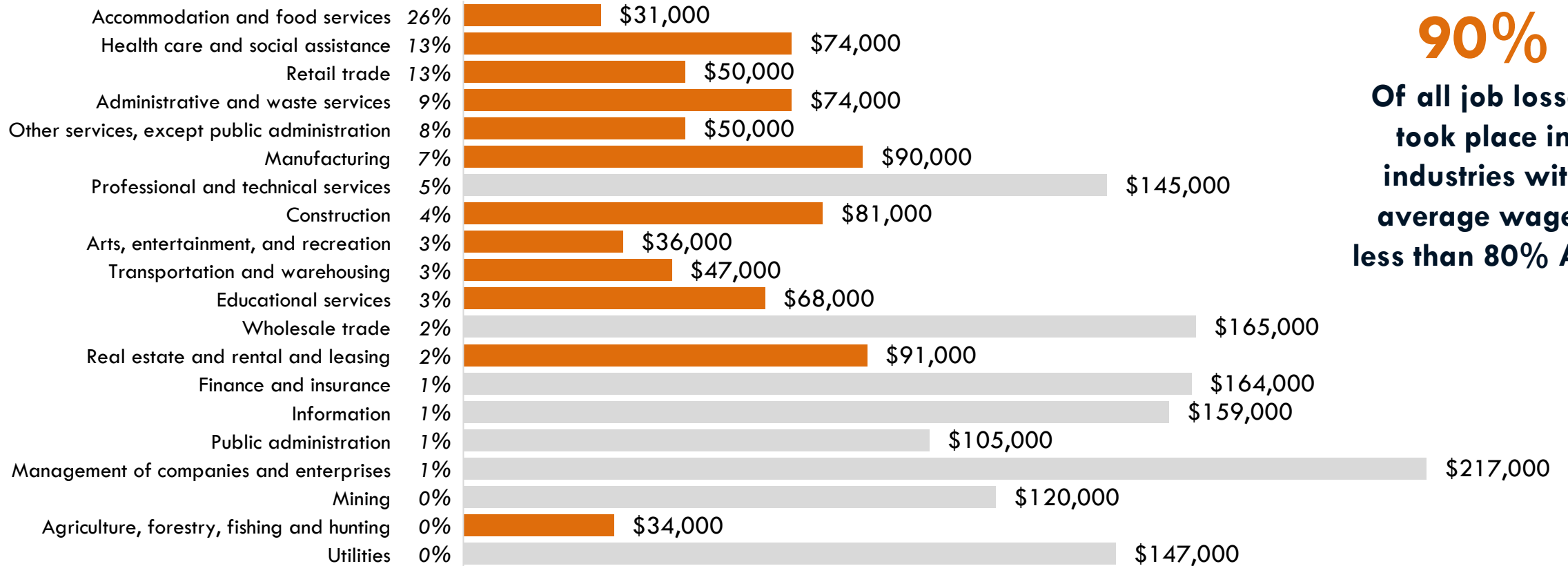
PROJECTED JOB LOSSES THROUGH DECEMBER 2020 % of Total Job Losses | # Job Losses



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

Job losses were disproportionately concentrated in sectors with relatively low wages, which means that workers who may have already been left out of the county's economic success were the most likely to lose employment. Now, many low-income households and communities are facing an additional economic burden due to the pandemic.

AVERAGE ANNUAL EARNINGS % of Total Job Losses | Average Annual Earning per Industry

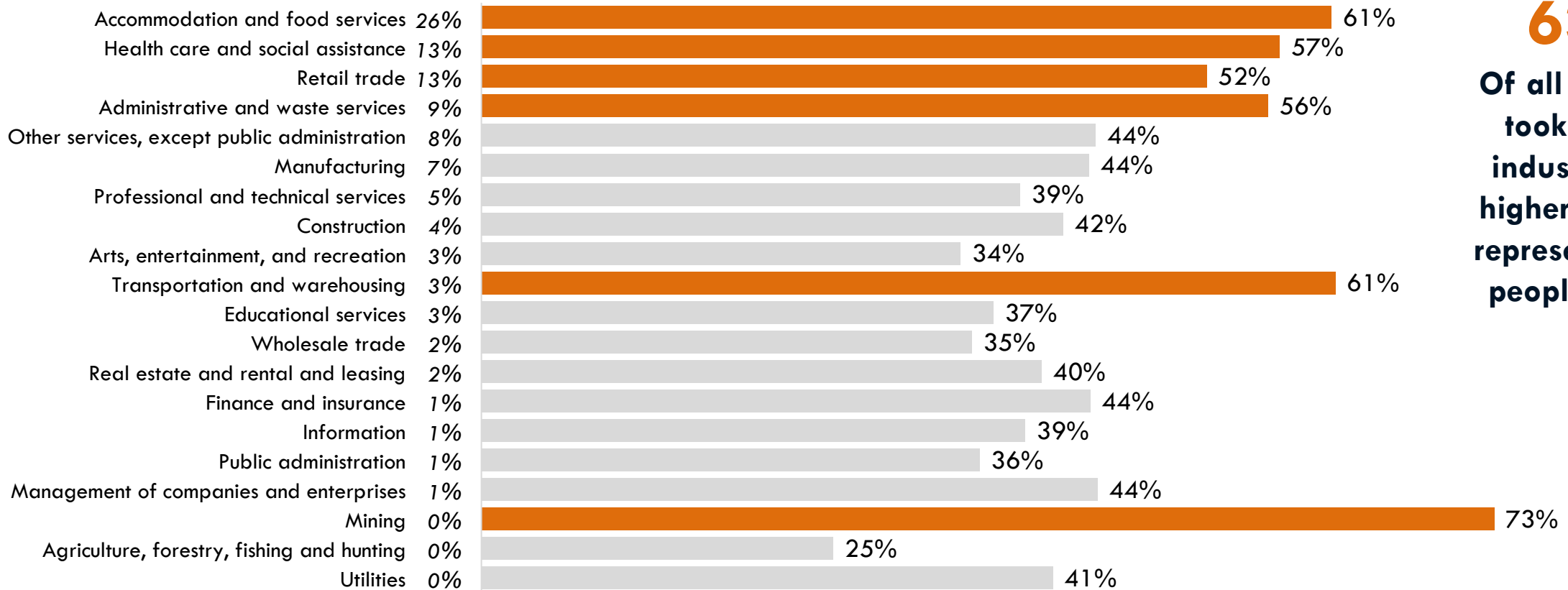


90%
Of all job losses took place in industries with average wages less than 80% AMI

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

Job losses were also disproportionately concentrated in sectors with higher concentrations of workers of color. 63% of all job losses in Fairfax County took place in industries with higher-than-average shares of workers who are people of color.

SHARE OF WORKERS OF COLOR % of Total Job Losses | Share of Non-White Workers per Industry



63%

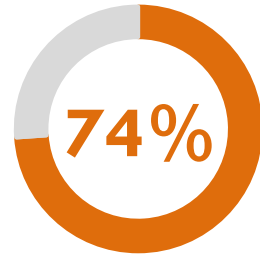
Of all job losses took place in industries with higher than avg. representation of people of color

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

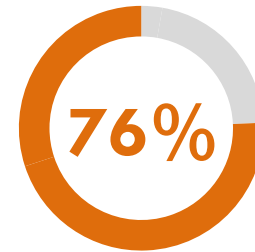
Aligning with the concentration of job losses in sectors with relatively low wages, lay-offs and furloughs were also concentrated in jobs that require relatively low-levels of formal education and training. With many of these traditionally accessible jobs currently impacted by the pandemic, workers seeking these positions may struggle to find new employment opportunities. In addition to bearing a disproportionate share of job losses, these workers are also more likely to be impacted by pre-existing inequities such as limited mobility, access to credit, and housing affordability, creating a longer and more challenging road to achieving economic stability.

FAIRFAX COUNTY JOB LOSSES BY POSITION REQUIREMENTS

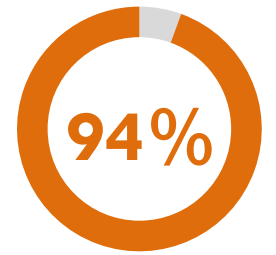
% COVID-RELATED JOB LOSSES IN FAIRFAX COUNTY



High school diploma or no credential required

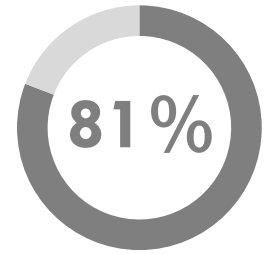
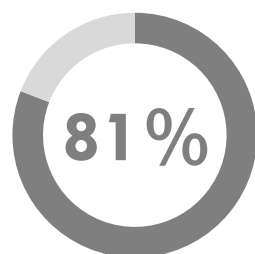
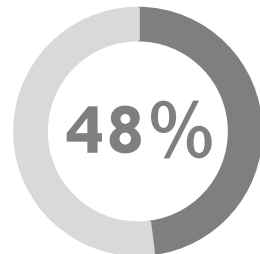


Short-term or no on-the-job training required



No prior job experience required

% OF TOTAL JOBS IN FAIRFAX COUNTY (2019)



IMPACT OF THE COVID-19 PANDEMIC | Impact on Workforce & Talent

Households in Fairfax County that earn 50% to 80% AMI likely spend an outsized share of their income on essential expenses, such as housing and childcare, leaving little remaining income for other necessities, such as savings and internet. This creates a barrier to wealth building and economic competitiveness for these households, with the pandemic now an added stressor. The pandemic is also likely to result in newly vulnerable households. For example, a family earning the median household income could find themselves in a lower-income bracket, as shown below, if one or two working adults lost their job due to the pandemic.

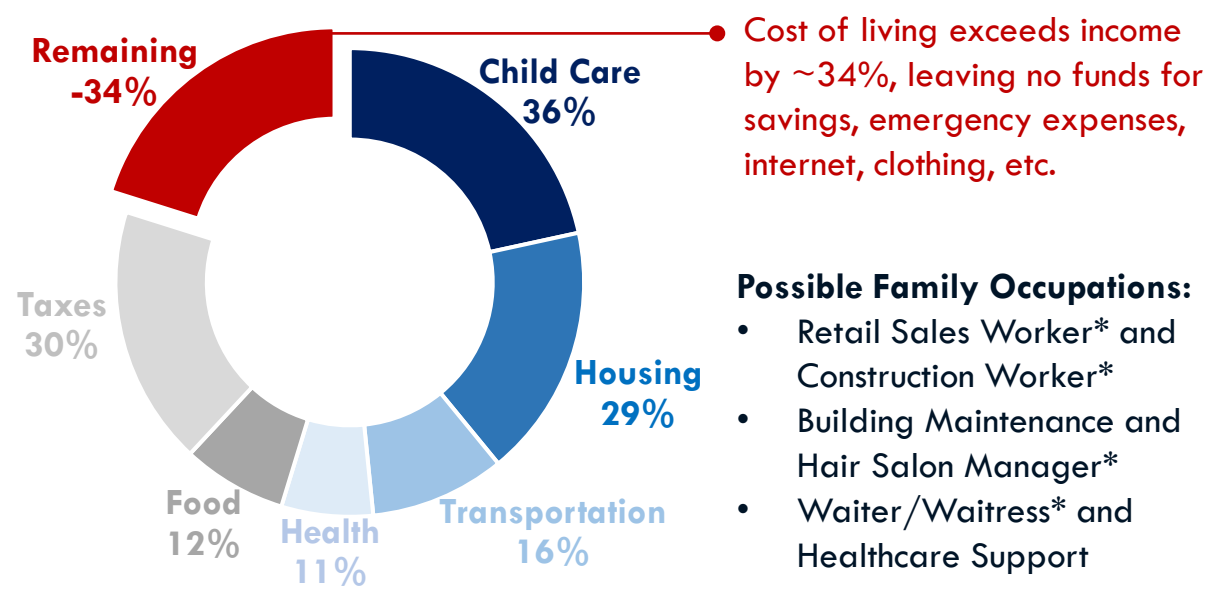
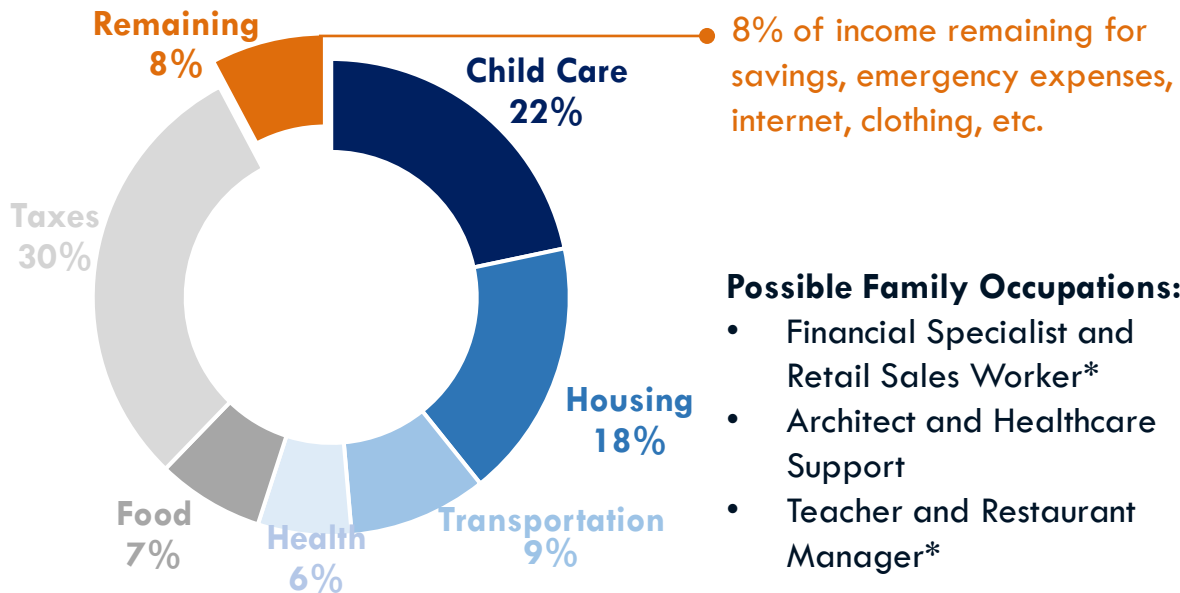
EXAMPLE OF HOUSEHOLD SPENDING IN FAIRFAX COUNTY

Share of household income on expenses for a family with 2 working adults and 2 children

*At-risk occupation

Family earning the median household income (\$122,227)

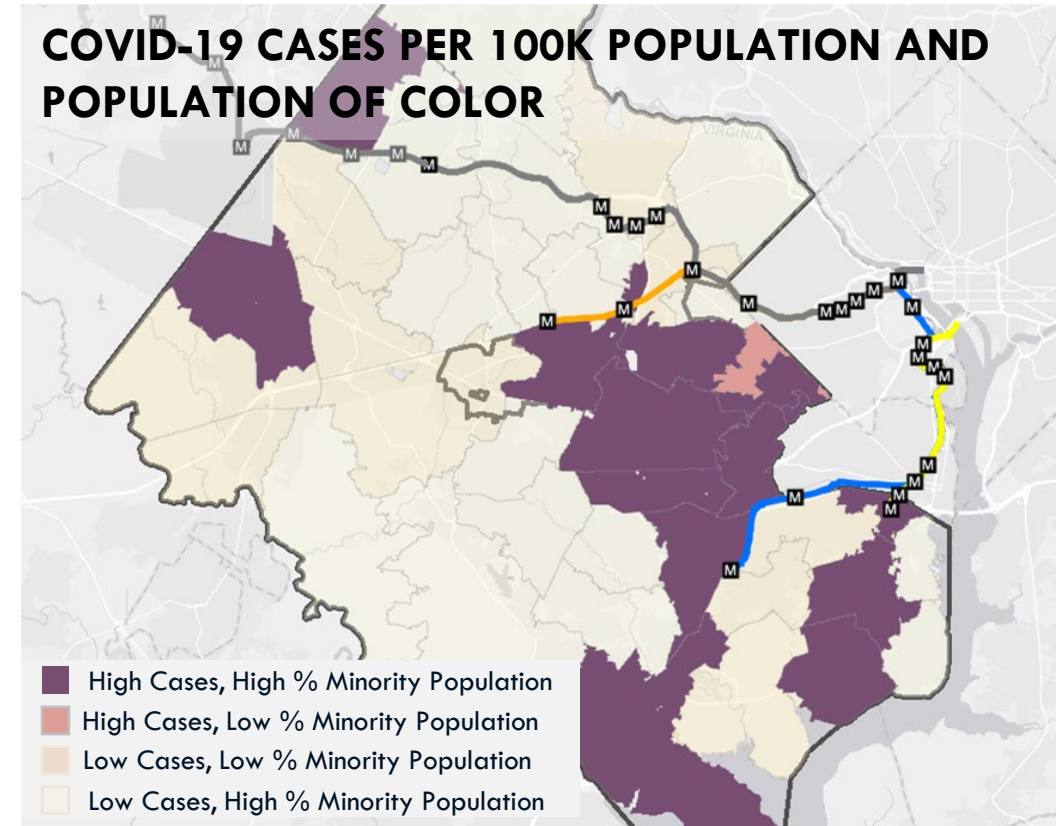
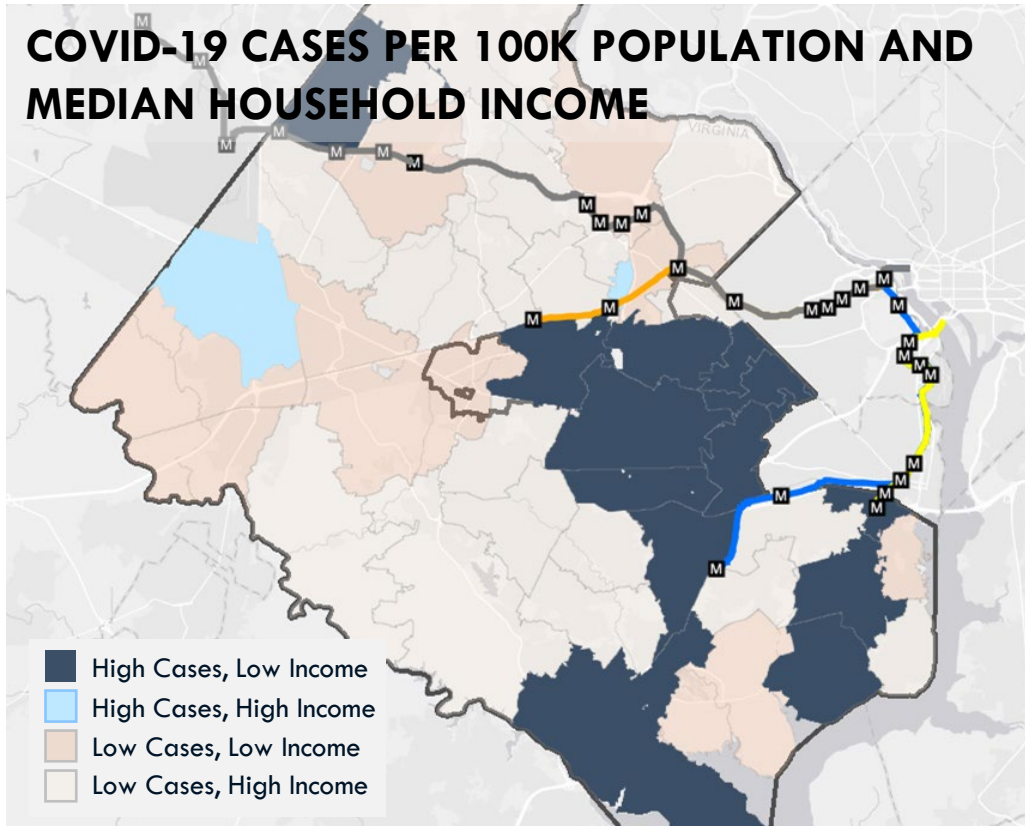
Family earning less than \$75,000 annually (50% - 80% AMI)



Source: Fairfax County, MIT Living Wage Calculator, ACS 2018 5-Year Data, Smart Asset
 Note: Assumes expenses for both households are equal, except taxes, which are fixed at 30% of income.

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

In addition to the economic challenges that many workers are now facing due to the pandemic, there are also new and amplified social challenges that have created barriers to recovery. The pandemic did not impact all communities in the county equally and had the greatest impact on minority and low-income communities. Almost every zip code that experienced an above average number of cases had below median incomes and an above average share of residents of color, with high case rates concentrated around Springfield, Annandale, Lorton, and Bailey's Crossroads.



*COVID-19 Cases by Zip Code data retrieved early October 2020. Data is updated and available [here](#).
Source: Fairfax County Health Department, Fairfax County GIS

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

Disparate health impacts compound the economic challenges facing historically underserved communities and households, hindering individuals' ability to find new employment, afford housing, supplies, and childcare, and participate in, and contribute to, Fairfax County's economy. This also puts additional strain on County and non-profit service providers, who are serving greater numbers of individuals and households over a longer period as the pandemic continues. Targeted resources to the most at-risk areas is a key to the economic recovery of minority and low-income households.

CHALLENGE

- Disparate health impacts

AT-RISK POPULATION

- Minority residents
- Low-income residents
- Underserved communities

ECONOMIC IMPACT

- Increased spending by service providers, including the county
- Lost wages and income tax revenue
- Decreased spending
- Less skilled and productive workforce

Studies of the national economic impacts for health, racial, and ethnic disparities helps to illustrate this impact:

- A 2012 study found that disparities in health cost the U.S. **\$60 billion** in excess medical costs and **\$22 billion** in lost productivity.
- A 2011 study found that if racial and ethnic disparities were eliminated:
 - Total U.S. personal income would increase by **8%**
 - **13 million** people would have been lifted out of poverty
 - Federal, state, and local tax revenue would have increased by **\$192 billion**
- A 2015 study that the Fairfax County's gross domestic product would have been **\$26.2 billion** higher in 2012 if its racial gaps in income were closed.

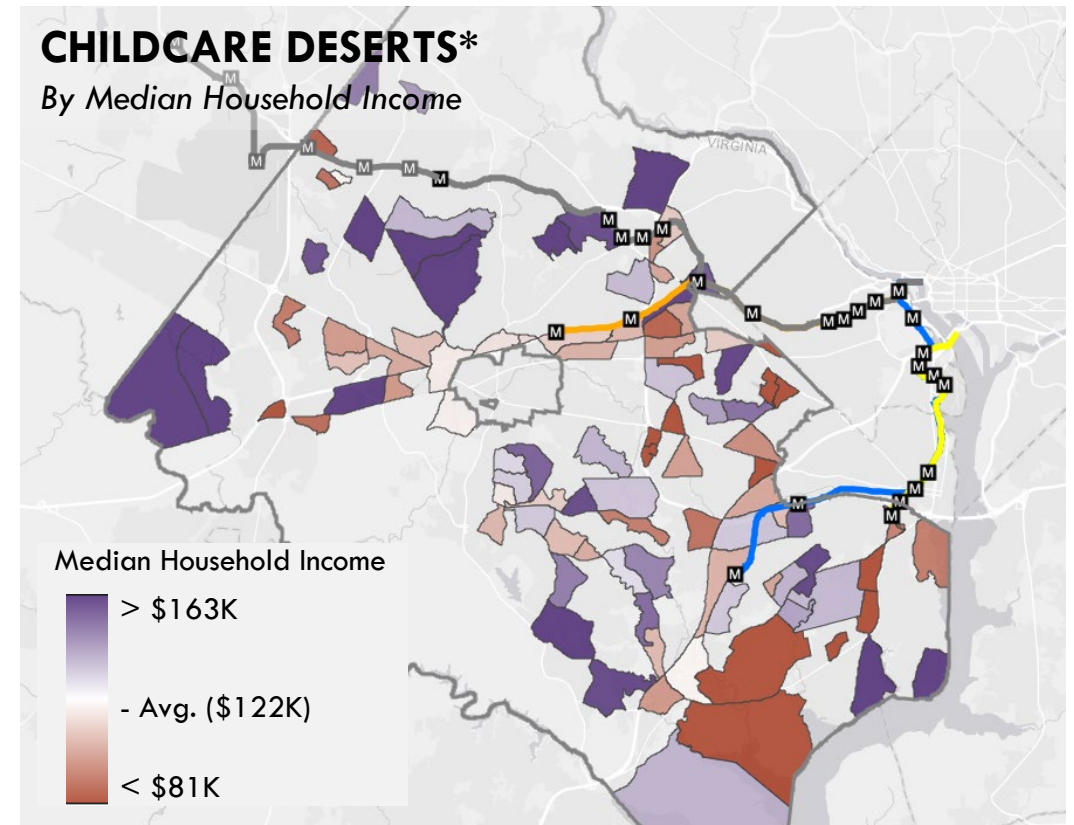
ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

Many workers, particularly women, will struggle to return to the workforce due to lack of access to childcare. Currently, ~39% of Fairfax County households live in a census tract designated as a childcare desert. Households across all income groups live in these tracts, indicating access to childcare is likely a supply or consumer preference challenge for medium- to high-earning households and both a supply and affordability challenge for lower-income households.

- **2/3rds** of childcare providers across the country said they would not survive a closure extended longer than one month.
- **39%** of Fairfax County households live in a census tract designated as a childcare desert.
- **62%** of county households that live in a childcare desert earn below the county's median income.
- A Fairfax County family with two young children earning the median household income spends up to **31%** of their income on childcare. The U.S. Department of Health and Human Services defines affordable childcare as no more than **7%** of a family's income.

*Child care deserts as defined by Center for American Progress: A childcare desert is any census tract with more than 50 children under age 5 that contains either no childcare providers or so few options that there are more than three times as many children as licensed childcare slots.

Source: Fairfax County, Center for American Progress, ACS 2018 5-Year Data



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

Amplified childcare access and affordability challenges disproportionately impact low-income households, minorities, and women. Limited access to childcare can deter working mothers' participation in the labor force and have significant impacts on the local economy, particularly in lost wages and income tax revenue.

CHALLENGE

- Child care accessibility and affordability

AT-RISK POPULATION

- Working parents of all incomes, particularly women of color

ECONOMIC IMPACT

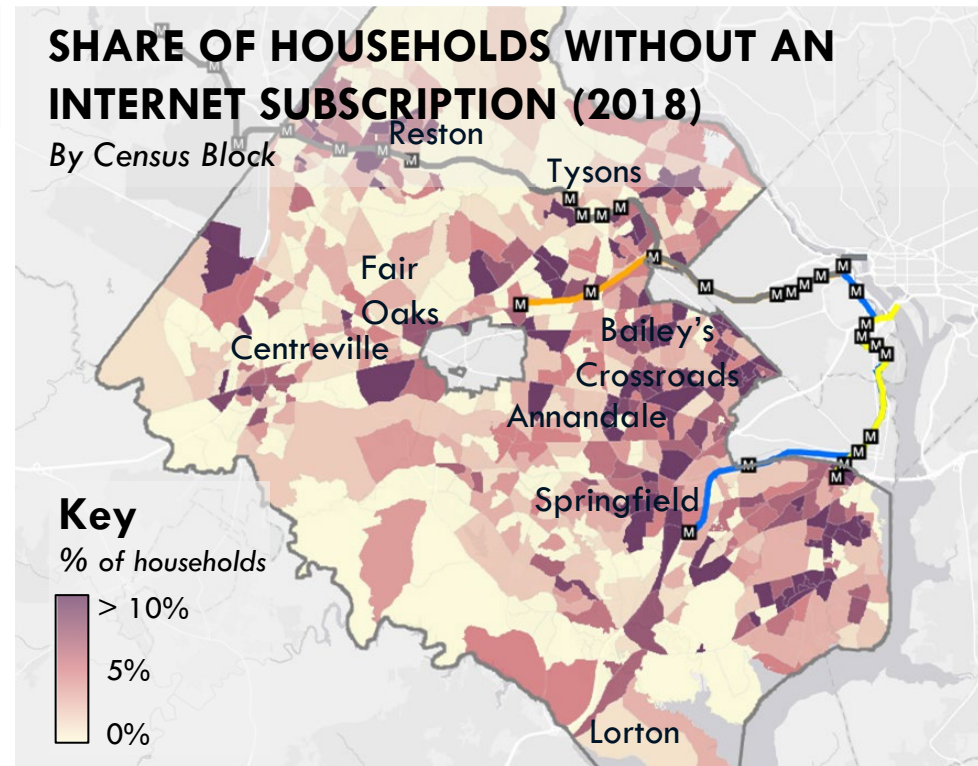
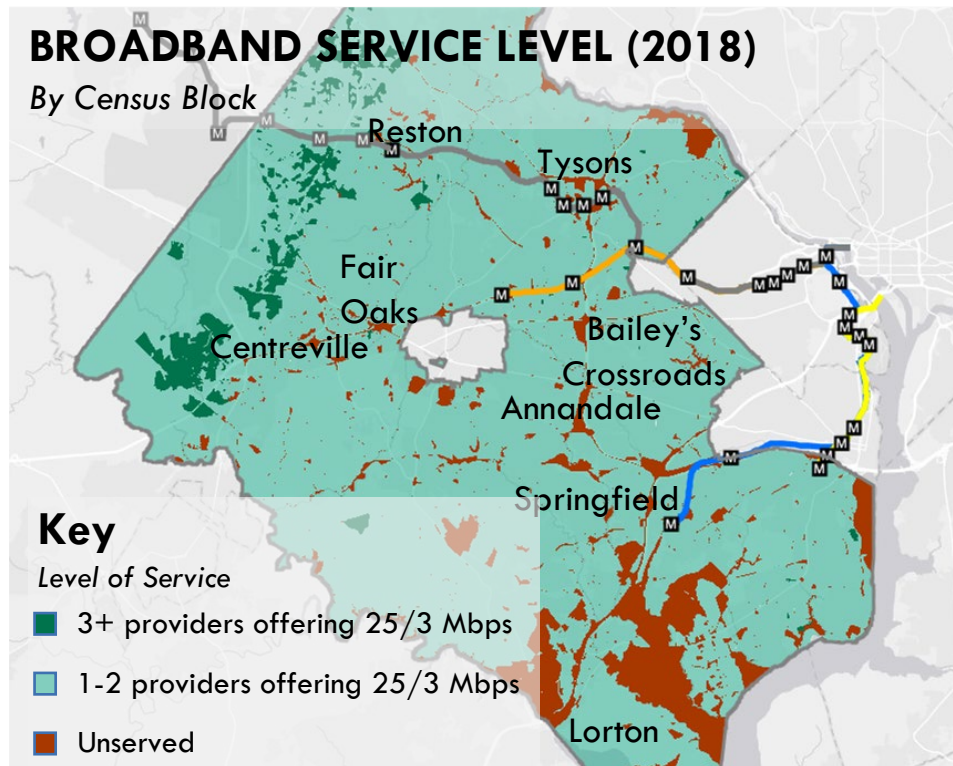
- Lost wages and income tax revenue
- Decreased spending
- Barrier to talent attraction

- While childcare accessibility impacts all caregivers, it has an adverse impact on the labor force participation rate for working mothers. In September 2020, **865,000** women left the labor force—more than **4x** the number of men who left the labor force and more than **3x** the number of jobs gained by women that month.
- **10%** of working mothers reported not working each week between April and August because they were providing care to a child.
- Working parents leaving the workforce will result in a national economic loss. For instance, for every 1% of mothers that leave the labor force, there will be an estimated **\$8.7 billion** in lost wages and **\$2.6 billion** lost tax revenue.
- It is estimated that more than 1% of working mothers will leave the labor force. Among workers aged 35 to 44, the national women's labor force participation rate **fell by more than 2 percentage points** from September 2019 to September 2020.

ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

The pandemic also amplified challenges related to digital access and literacy in the county due to the pandemic, with low-income households, non-English speakers, and older residents being adversely impacted. In Fairfax County, infrastructure is not the primary challenge, but affordability may be. Households without internet access are concentrated in many of the relatively low-income and minority communities that were most impacted by COVID-19.

16% of households earning <\$75,000 do not have an internet subscription, compared to 3% earning >\$75,000 annually.



ECONOMIC IMPACT OF THE COVID-19 PANDEMIC | Workforce & Talent

Internet access is a requirement for economic competitiveness, especially as more and more job opportunities shift online, and potentially as the “work from anywhere” economy extends beyond the pandemic for some industries. Households that already earn relatively low wages will face a longer recovery without adequate internet access and digital literacy skills, as these are required to access higher-skill and higher-earning jobs. National studies cited in a St. Louis Federal Reserve Bank article concur that internet access, and closing the digital divide, is critical to unlocking economic opportunities. The article cites that:

CHALLENGE

- Digital access and literacy

AT-RISK POPULATION

- Minority residents
- Low-income residents
- Non-English speaking residents

ECONOMIC IMPACT

- Decreased economic competitiveness

- Nationwide, **90%** of Americans used the internet for their most recent job search (2015), which is more than double than 10 years ago (2005).
- **82%** of middle-skill jobs (requiring more than a high school degree, but not a four-year degree) require digital skills.
- Baseline digitally intensive middle-skill jobs pay a **17%** premium above non-digitally based roles. Digital middle-skill jobs are occupations where fewer than 80% of postings call for a bachelor’s degree and hourly median wage is above the national living wage. Digital skills include programming, social media, health care technology, etc.

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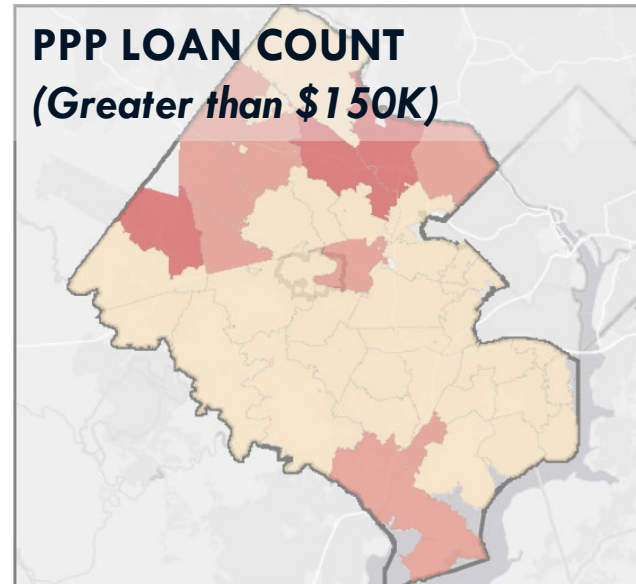
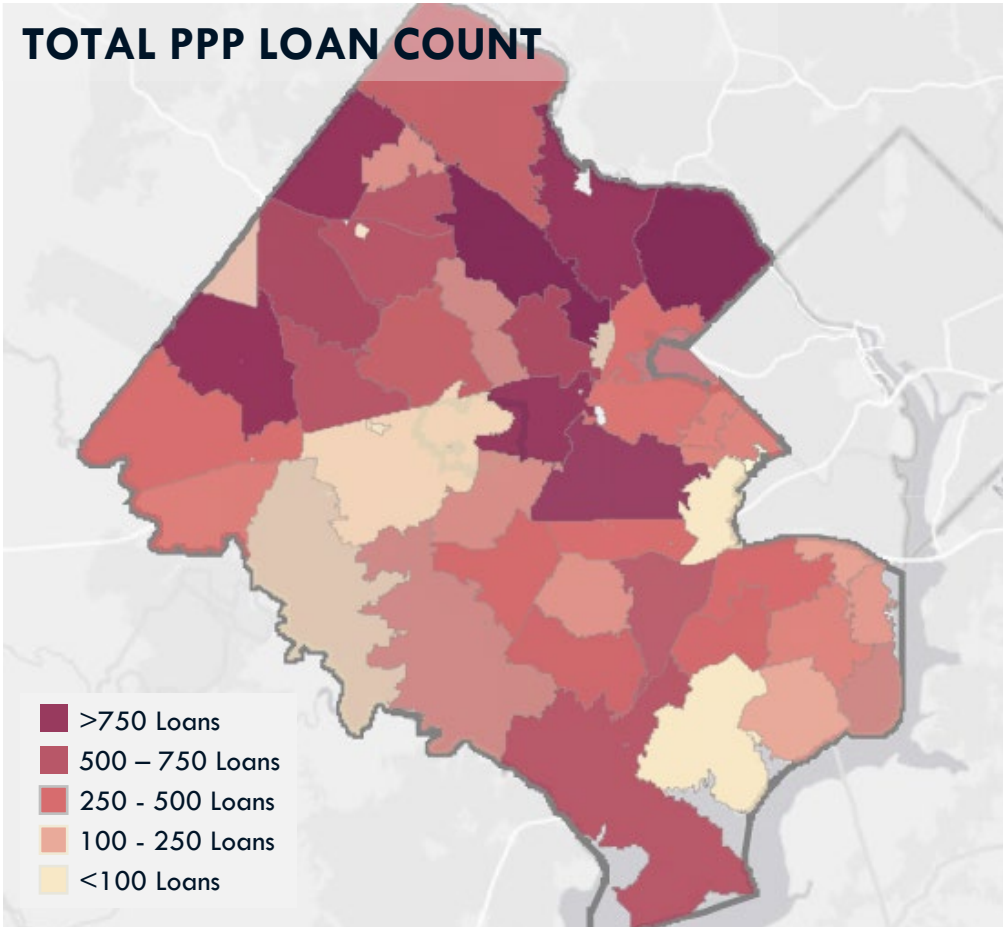
Recommendations Overview

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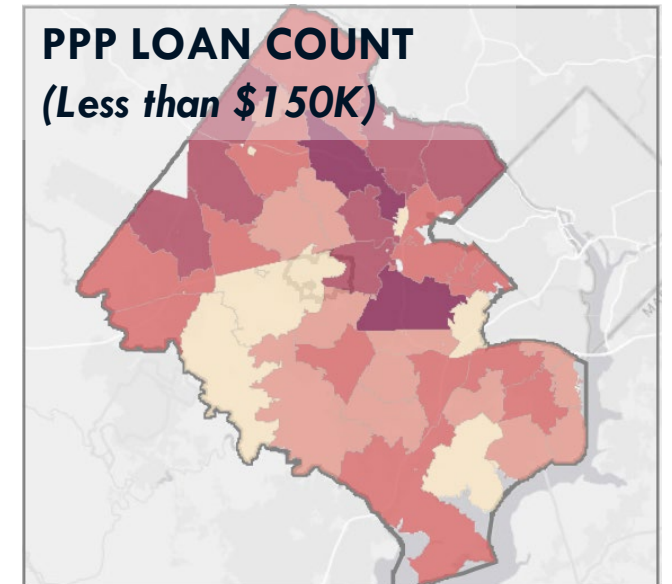
ECONOMIC RECOVERY | Federal Initiatives

In response to the COVID-19 pandemic, the Small Business Administration launched the Paycheck Protection Program (PPP) which offered forgivable loans designed to incentivize small businesses to keep their employees on payroll. In Fairfax County, more than 17,000 PPP* loans were distributed by August 2020, retaining more than 197,000 jobs.



3,000 loans distributed

143,000 jobs retained



14,000 loans distributed

54,000 jobs retained

* The PPP loan data on this slide is current as of August 2020.
Source: FCEDA

ECONOMIC RECOVERY | Local & Regional Initiatives

Fairfax County and its partners, including the Fairfax County Economic Development Authority (FCEDA), had robust economic development infrastructure in place before the pandemic. This enabled the County and FCEDA to quickly mobilize programs and resources to support impacted businesses, stemming further job and business loss during the pandemic to date.



FINANCIAL SUPPORT

- Issued ~1 million in microloans through the **Fairfax County Small Business COVID-19 Recovery Microloan Fund** and \$52.5 million grants through the **Fairfax RISE Grant Program**.
- Assisted more than 21,000 businesses in accessing PPP funds and RISE grants.
- Issued \$5 million to non-profits through the **Fairfax County Social Safety Net Nonprofit Sustainability Grants Program** and distributed over **\$18 million** in Federal Cares Act funding to support basic needs of residents.



TECHNICAL SUPPORT & GUIDANCE

- Established a **Business Resiliency Roundtable**
- Provided **centralized information about federal programs**, made available in four languages.
- Offered free legal assistance through the **COVID-19 Pro Bono Collaborative**
- Held **12 webinars** are part of a business resiliency series

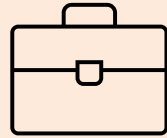


REGULATORY ACTION

- **Adopted an ordinance** to allow parking lots and outdoor spaces to be used for outdoor dining and exercise facilities.
- Increased **flexibility in permitting regulations** to support home-based businesses and food trucks.
- Moved **entitlements, building permitting, and inspection services online** and developed tools to guide users through the online permitting system.
- Added ten additional “plan types” to the e-permitting system to improve customer service.

ECONOMIC RECOVERY | Local & Regional Initiatives

The County also moved quickly and in coordination with local and state partners to deploy resources to support workers and job-seekers impacted by the pandemic to leverage programs that existed prior to the pandemic to ensure that workers, as well as students and under-resourced individuals, can access the services they need.



WORKFORCE AND TALENT DEVELOPMENT

- Providing **tools for job searches** through the **Virginia Career Works Centers***, a **new website** to connect unemployed workers with companies hiring, and numerous **virtual career fairs** targeting different skill levels
- Created a portal with **information on workforce training programs**



SUPPORT FOR WORKERS & FAMILIES

- Provides **Wi-Fi hot spots** available to check out at schools*
- Provides centralized information on **locations with free Wi-Fi***
- Offers **Fairfax County Technology Programs** with digital courses*
- Initiated **Return to School Program** supports virtual learning
- Offers resources and referrals related to childcare through **Child Care Assistance and Referral Program***
- Offers option to participate in **Head Start and Early Head Start***
- Initiated the **Eviction Prevention Task Force**
- Secured **445 hotel rooms** for displaced residents and homeless residents
- Advancing a **Health in All Policies plan***
- Delayed tax payment due dates and decreased penalties.

* Program initiated prior to the COVID-19 pandemic

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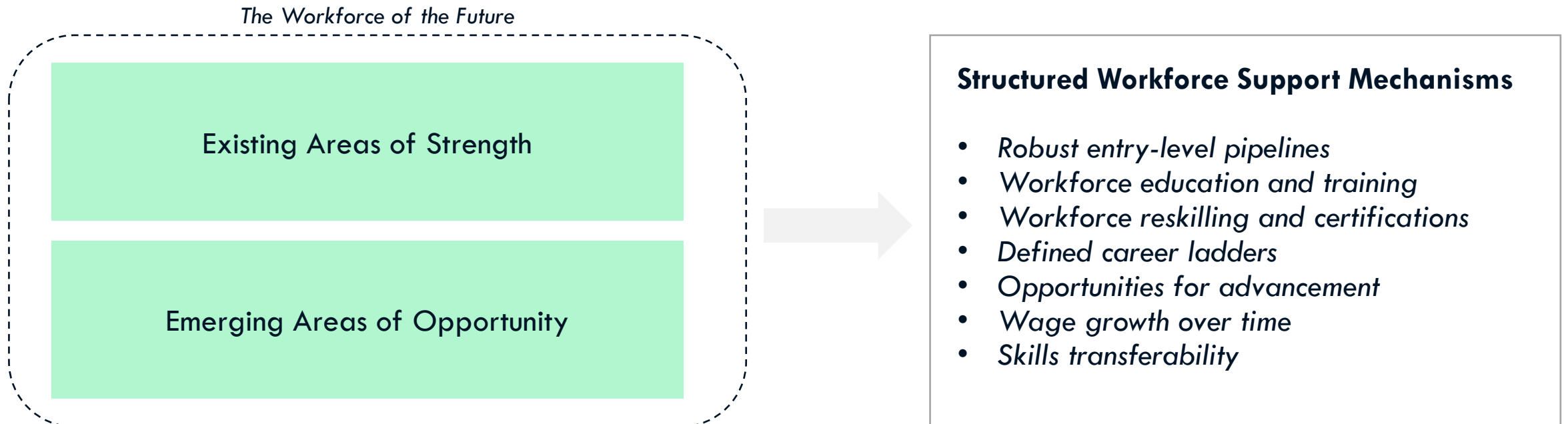
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ECONOMIC RECOVERY | Looking to the Future

Stakeholders consistently expressed that this moment of crisis provides an opportunity to build towards a “new normal” by addressing existing disparities in the County. Rather than rebuilding systems that perpetuate inequities and/or disproportionately serve some communities while leaving out others, stakeholders emphasized that a just and resilient recovery for Fairfax County should include a focus on ensuring that all residents and workers had opportunities to reach economic success and share in the county’s future growth. An important part of this effort that was also supported by many stakeholders is defining **pathways into industries and occupations** with **opportunities and structured support for upward mobility and shared prosperity** in both the short-term and long-term.



ECONOMIC RECOVERY | Looking to the Future

Fairfax County's success over the prior decade is largely attributed to two primary clusters – technology and government. Technology, which has been a driving force behind recent economic expansion in the county, consists of several complementary clusters that have collectively solidified the region as a hotspot for innovation. The professional and technical services sector only accounted for 5% of COVID-induced job losses and growth in this sector has rebounded quickly. Government, a stable pillar of employment in Fairfax County is also an area of strength the county can lean on during recovery and beyond. Given its proximity to D.C., Fairfax County is positioned to continued to attract and retain government workers and the region can rely on steady employment in this sector given its presence of agencies and established contractors. The county should continue expanding the workforce pipeline for these areas of strength.

EXAMPLES OF EXISTING AREAS OF STRENGTH



Technology

- Fairfax County is home to over **8,900 technology-focused** enterprises and businesses.
- Specific clusters that have emerged include artificial intelligence, machine learning, blockchain, drones, autonomous driving, augmented/virtual reality, Internet of Things, cybersecurity, and more.
- **1 of every 4 jobs** in Fairfax County are directly related to the technology sector.



Government

- The U.S. federal government is the world's largest buyer of goods and services and year after year, **more federal procurement awards go to companies located in Fairfax County** than any other county or city in the country.
- Government **agencies headquartered in the county** include multiple DOD components, the CIA, the National Geospatial-Intelligence Agency, Fort Belvoir, and the National Reconnaissance Office.
- **Proximity the Pentagon and D.C.** which offers instant access to customers, regulators, and multiple business partners.

ECONOMIC RECOVERY | Looking to the Future

In some industries, COVID-19 has accelerated growth trends that were emerging prior to the pandemic. For instance, the convergence of healthcare and technology has been cited by experts as a rapidly evolving sector of the wellness field, even before the country embraced telemedicine overnight, and web services and ecommerce were already transforming a variety of industries before all non-essential sectors moved to remote work. Given Fairfax County's pre-COVID regional specialization and growth in several of these occupations and industries, these clusters could represent potential opportunities for future growth if coupled with public policy that supports workforce training and reskilling for these areas that links residents and workers with employment opportunities.

EXAMPLES OF EMERGING AREAS OF OPPORTUNITY

Health Technology

- R&D in Nanotechnology (+2000%; 3.2 LQ)
 - Clinical Laboratory Technicians (+4%; 1.3 LQ)
-
- Research Development in Life Sciences (3.7 LQ)
 - Other Scientific and Technical Consulting (3.1 LQ)

Digital Services & E-Commerce

- Custom Computer Programming (+20%; 4.6 LQ)
- Publishing & Web Search Portals (+21%; 1.3 LQ)
- Software Developers (+21%; 5.1 LQ)
- Web & Digital Interface Developers (+21%; 2.4 LQ)

Clean Energy & Green Jobs

- Natural Gas Distribution (+20%; 2.2 LQ)
- Environmental Engineering Technologists (+223%; 4.1 LQ)

Key Strong regional specialization (LQ) AND positive recent growth (% since 2014)

Strong regional specialization (LQ)

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RECOMMENDATIONS | Summary

The following pages summarize the recommended actions for the County to take to address the needs and challenges faced by businesses, workers, and families due to the COVID-19 pandemic. While the County is the lead entity responsible for the implementation of these actions, success of these efforts depends on partnership and coordination with a variety of collaborators including regional governments and stakeholders, State government, nonprofits, business support organizations, local employers, higher education institutions, and others.

The recommended actions span across five distinct categories including Business Recovery and Resilience, Regulatory Action, Workforce and Talent Support, Support for Workers and Families, and Physical and Community Planning.



Business Recovery & Resilience



Regulatory Action



Workforce & Talent Support



Support for Workers & Families



Physical & Community Planning

Pages 56-59 include a high-level summary of the recommended actions as well as the timeframe over which these should be implemented and prioritized. Detailed descriptions for each action, including the existing County response, description, funding sources, potential partners, and metrics relevant for each suggested recommendation start on page 60.

RECOMMENDATIONS | Summary

The following recommendations respond to the impacts of the COVID-19 pandemic on businesses and services providers throughout the county and are aimed at supporting recovery as well as strengthening businesses and non-profits to be able to withstand future shocks and stresses. “**First moves**,” the highest priority initiatives with potential to be deployed rapidly, are indicated in **bold** text.



Business Recovery & Resilience

Launch targeted small business recovery & resilience programs focused on delivering technical support to small businesses in the industries and communities most impacted by the pandemic.

Roll out a dynamic “buy local” campaign for small businesses throughout the county, focused on goods Made in Fairfax and elevating minority-owned businesses.

Identify strategies to reduce small and local business costs, including through engagement with private-sector landlords and lenders.



Regulatory Action

Continue to improve the online permitting process, particularly for commercial users making pandemic-related improvements.

Continue advocating for legislation that prioritizes: i) local purchasing, and ii) procurement from minority-owned businesses.

RECOMMENDATIONS | Summary

A just recovery must also provide support directly to workers and families who have been directly impacted by the pandemic. The strategies below are focused on linking job seekers to employment opportunities now, strengthening countywide resources for job training and reskilling, and supporting families who are struggling to engage in the economy. “**First moves,**” the highest priority initiatives with potential to be deployed rapidly, are indicated in **bold** text.



Workforce & Talent Support

Leverage County resources to link job seekers with employment opportunities by:

- 1. Hiring local workers to support pandemic recovery efforts**
- 2. Strengthening job training and placement programs, focusing on individuals & communities impacted by the pandemic**

Coordinate improvements to certification and skills-based job training and reskilling programs and bring these opportunities to low-income communities and communities of color.

Pilot a neighborhood job and entrepreneur center, building toward a long-term investment strategy to be deployed throughout the County.



Support for Workers & Families

Expand access to affordable childcare to enable more parents, particularly women, to take part in the workforce.

Partner with internet service providers to ensure that all Fairfax County residents can access affordable internet service and expand reach of County digital literacy programs, a key to accessing economic opportunities.

Create efficient and integrated client-facing access to Fairfax County and partner-provided health, housing, and human services.

Commitment to and implementation of affordable housing production goals.

RECOMMENDATIONS | Summary

As the public health crisis lifts, well-positioned commercial corridors and districts can be engines for economic recovery. At the same time, support for struggling commercial corridors will be essential for community recovery. The following recommendations respond to these needs and opportunities as the County looks past recovery to stabilization.

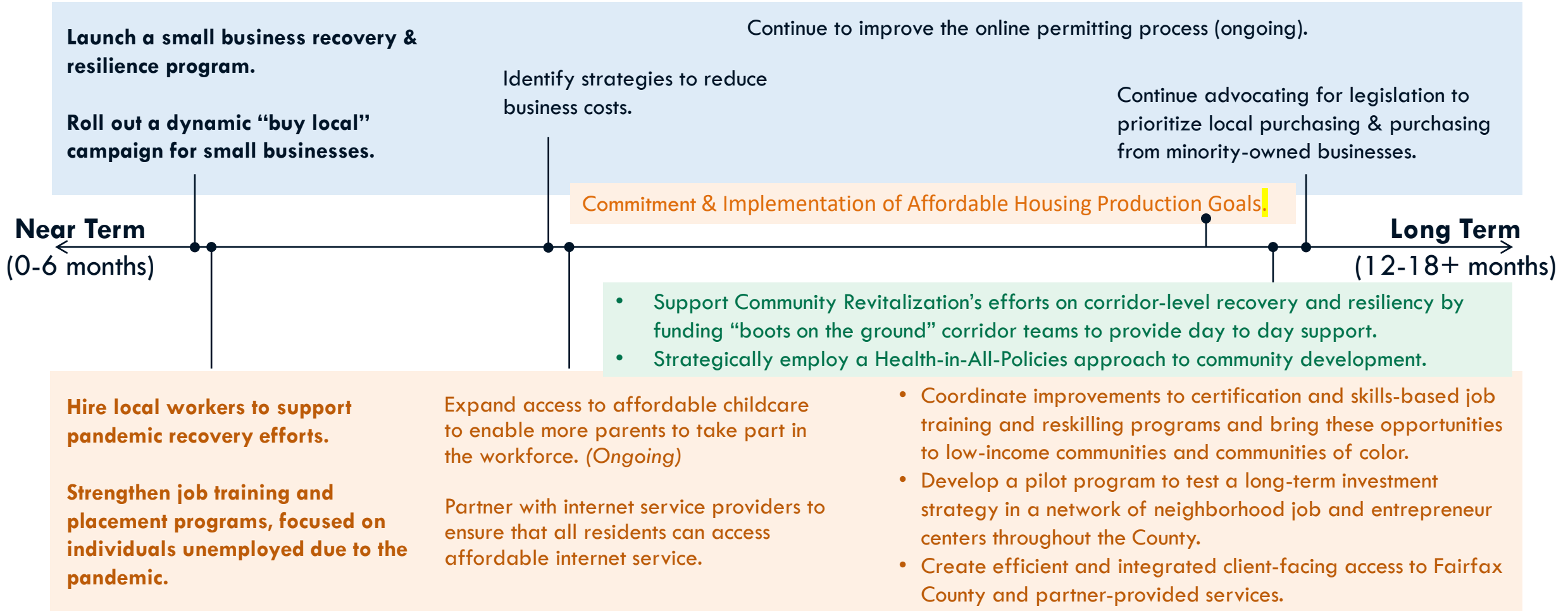
»» Physical & Community Planning

Support corridor-level recovery by establishing “boots on the ground” corridor teams to provide day to day support to businesses.

Strategically employ a Health in All Policies approach to community development.

RECOMMENDATIONS | Prioritization

The County should launch initiatives in the near term that boost economic activity immediately, with strategic initiatives that will strengthen businesses' and workers' economic resilience to follow. Many of these strategic initiatives may continue on beyond this 18-month recovery period supporting recovery and stabilization but also long-term resilience and equity in Fairfax County.



Timing is approximate and does not account for time required for program approvals, legislative action, etc.

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RECOMMENDATIONS | Business Recovery & Resilience

FIRST MOVE: Launch targeted small business recovery & resilience programs focused on delivering technical support to small businesses in the industries and communities most impacted by the pandemic.

Existing County Response	In addition to business startup and support services that are typically offered, Fairfax County and its local partners worked to offer businesses a number of resources for recovery, from issuing ~\$52.5 million in grants to small businesses to assisting more than 21,000 businesses in accessing PPP funds to creating a webinar series and offering pro bono legal assistance to businesses in need of support during the pandemic.
Description	Given the long road to recovery that most businesses face, the County should launch a program focused on continued recovery and building the resilience of small businesses throughout the county. Initiatives may include: <ul style="list-style-type: none">• Expanding capacity for outreach to businesses, potentially through expansion of the BizEx team, with team members focused on outreach to businesses in the communities that have endured the most extensive health and economic impacts.• Business technical assistance programs (webinars, online tools, etc.) to provide up-to-date COVID-19 best practices for reopening and worker/customer safety, tutorials for accessing funding programs, tutorials or trainings for business emergency planning, pivoting to e-commerce, transitioning to employee-ownership, and more.• Formalizing and strengthening partnerships with district or community-level business support organizations to deliver technical assistance. These organizations can be essential to overcoming language barriers, technological barriers, and reaching businesses that are unbanked.• Encouraging and supporting business formation and expansion in Opportunity Zones and the County's revitalization areas, where public incentives may be available or directed, and any future stimulus funding should be prioritized.• Educating business owners and long-time employees about options for employee ownership, creating opportunities for wealth building and business stabilization.

Continued...

RECOMMENDATIONS | Business Recovery & Resilience

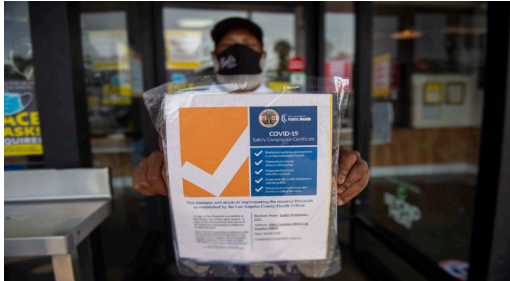
FIRST MOVE: Launch targeted small business recovery & resilience programs focused on delivering technical support to small businesses in the industries and communities most impacted by the pandemic.

Continued...

Funding Sources	<ul style="list-style-type: none">• Current: Economic Opportunity Reserve (EOR), remaining Federal stimulus funding, if any; redirected State and County operating funds; leverage partnership with corridor-level business support organizations, both traditional (Chambers, BACs, etc.) and non-traditional (faith-based organizations, community groups, etc.), who may be able to access State and philanthropic funds• Future: Future Federal stimulus funding, which may require advocating for federal funds dedicated to local government and government or community-led business support programs
Potential Partners	Requires coordination with local business organizations, including chambers and business support organizations.
Metrics	<ul style="list-style-type: none">• # businesses that regularly interact with the County (participation in web programs, in-person or phone contact, etc.)• # businesses operational in 6, 12, 18, 24 months from the outset of the pandemic (or launch of the program)• # new business openings• Time to opening for new businesses• Ownership distribution of new businesses by race and gender• Storefront vacancy in census tracts that were most impacted by COVID-19, census tracts with the lowest incomes, and census tracts with the highest share of populations of color

PRECEDENTS | Business Recovery & Resilience

FIRST MOVE: Launch targeted small business recovery & resilience programs focused on delivering technical support to small businesses in the industries and communities most impacted by the pandemic.



The LA County COVID-19 Safety Compliance Certificate Program

This program enables businesses to voluntarily take a training and receive a COVID-19 Safety Compliance Certificate to place at the public entrances of the facility to show customers that they are fully implementing the required COVID-19 protocols.



The Mesa CARES Small Business Technical Assistance Program

The City of Mesa is partnering with several local business support organizations to provide free small business technical assistance webinars, online training, and coaching in Spanish. These support services covered a range of topics and included interactive discussions, group coaching, and one-one-one counseling. The program was funded using a share of the City's CARES Act funds.



Portland Digital Divide Workgroup

At the onset of the pandemic, the City of Portland launched a digital divide workgroup in response to COVID-19 in which their equity consulting advisors (hired pre-pandemic) could immediately plug into the community to reshape outreach language and facilitate active participation. The workgroup focused on internet access for community members and community organizations.



One Atlanta: Economic Mobility, Recovery, and Resiliency Plan

Atlanta released One Atlanta: Economic Mobility, Recovery, and Resiliency Plan. The plan aims to provide businesses with the tools needed to survive the pandemic and become more resilient when facing unexpected economic downturns.

RECOMMENDATIONS | Business Recovery & Resilience

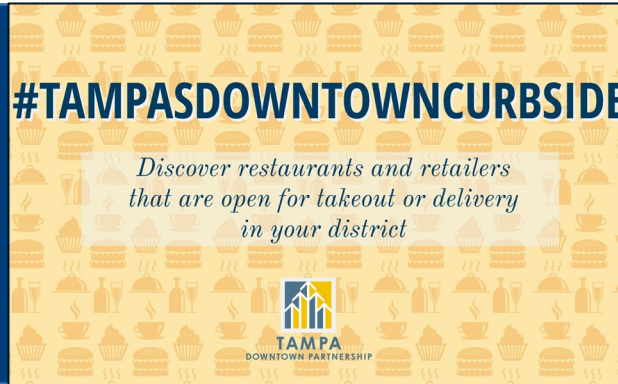
FIRST MOVE: Roll out a dynamic “buy local” campaign for small businesses throughout the county, focused on Made in Fairfax goods and elevating minority-owned businesses.

Existing County Response	The County’s online COVID-19 information portal links to neighborhood-level business organization websites and the Fairfax First FXVA Take Out Trail campaign, promoting patronage of local restaurants.
Description	<p>The County can demonstrate that it stands behind local businesses and raise their profiles by rolling out a campaign that helps local businesses advertise the service and goods they can provide during the pandemic and recovery. This would include:</p> <ul style="list-style-type: none">• Creating a dynamic digital campaign that communicates the impact of buying from local businesses (supporting neighbors, the increased economic impact of local purchasing, etc.) and features Fairfax businesses and places to shopping, dining, and entertainment. This is also an opportunity to elevate minority-owned businesses.• Elevate the visibility of a “Made in Fairfax” campaign by installing a physical storefront in major commercial centers like Tysons Corner, Mosaic District, and more.• Launch a digital app to identify and highlight participating businesses, feature owner bios and background on the business’ history in the local area and provide a platform for special business deals and offers. The app could also provide an opportunity to “gamify” the program and allow consumers to earn points for buying local and compete with peers.
Funding Sources	Remaining Federal stimulus funding, if any; redirected State and County operating funds
Potential Partners	Requires coordination with local business organizations, including chambers, community-based business support organizations, and other business advocacy organizations, such as Visit Fairfax, to capture all businesses for promotion and amplify marketing efforts.
Metrics	<ul style="list-style-type: none">• Monthly consumer spending relative to pre-COVID levels• Consumer traffic at participating businesses• Retail revenue at participating businesses• Performance of minority-owned businesses

PRECEDENTS | Business Recovery & Resilience

FIRST MOVE: Roll out a dynamic “buy local” campaign for small businesses throughout the county, focused on Made in Fairfax goods and elevating minority-owned businesses.

In March, Tampa launched the **#TampasDowntownCurbside** social media campaign. The campaign uses social media to highlight local restaurants offering takeout menus and allowed followers to stay informed on local businesses.



California Shop Safe Shop Local Portal

California has a portal to offer free or discounted resources for businesses to transition online, find e-commerce tools, learn about industry-specific safety guidance, locate small business centers, and access personal protective equipment. The portal highlights videos with small business owners speaking on how they have adapted safely. It also includes a digital media toolkit with free marketing materials, including downloadable logos to show participation in the shop local campaign or safety compliance and downloadable customer newsletter templates.

Miami launched a **Buy Miami** promotional program, which offers small businesses free, individualized online promotional listings on a new website. The program aims to help local small businesses recover, while offering special deals to customers.



RECOMMENDATIONS | Technical Support & Guidance

MID-TERM: Identify strategies to reduce small and local business costs, including through engagement with private-sector landlords and lenders.

Existing County Response	<p>To date, the County and FCEDA have taken an active role in supporting small businesses. The County has issued ~\$52.5 million in grants to small businesses and assisted more than 21,000 businesses in accessing PPP funds. The County has also provided a range of technical assistance and services to businesses, including a 12-session webinar series and pro bono legal assistance to businesses who needed support. Additionally, FCEDA has launched a webinar series to share information to support small businesses and promoted a NOVA EDA webinar series specifically to help businesses think about their futures beyond the pandemic (called “Beyond COVID-19: NOVA Business Resiliency Webinars”).</p>
Description	<p>With reduced revenue, many businesses are still struggling to pay rent and will continue to struggle to meet operating costs throughout this period of reduced business activity. Emergency funding provides a necessary infusion of funds, while interventions at the lease or building loan level provide a more sustainable path to business relief (that can extend beyond the funds offered by grant and loan programs). These interventions also help to stabilize commercial corridors and community shopping centers by preventing massive storefront vacancies. The County should launch a program focused on continuing to support cost reduction strategies for small businesses. Initiatives may include:</p> <ul style="list-style-type: none">• Developing an incentive program for landlords to restructure or amend leases with commercial tenants or potentially support the flow of benefits from landlords to businesses in the case that a landlord is able to restructure a loan with their lender, among other options.• Working with a research or business organization, such as the GMU Center for Retail Transformation, to support discussions with major commercial property owners and landlords, banks and lenders, and small businesses themselves to understand challenges and solutions. Create a template of options for these groups to reach negotiated lease terms. Engage with major tenants to execute and help set a precedent and example that could expand throughout the county.

RECOMMENDATIONS | Technical Support & Guidance

MID-TERM: Identify strategies to reduce small and local business costs, including through engagement with private-sector landlords and lenders.

Continued...

Funding Sources	No new funding
Potential Partners	Requires partnership with FCEDA and other business support organizations to help define business needs and develop resources; may also require coordination and collaboration with major property owners and landlords
Metrics	<ul style="list-style-type: none">• Storefront vacancy• Rate of business closures (slowing)• Commercial rent trends

RECOMMENDATIONS | Regulatory Action

MID-TERM: Continue to improve the online permitting process, particularly for commercial users making pandemic-related improvements.

Existing County Response	Fairfax County Land Development Services swiftly moved all building inspection and permitting services online at the outset of closures due to the pandemic.
Description	<p>Building on initial efforts to bring permitting processes online will help businesses reopen or remain open with necessary modifications to ensure worker and customer safety. Elements should include:</p> <ul style="list-style-type: none">• Enabling flagging/prioritization of applications for modifications or improvements to accommodate health safety protocols (for instance, changes to space to accommodate better HVAC, social distancing, etc.).• Ensuring a faster, clearer system for communicating with applicants about application issues and feedback, to move permitting applications forward.• Creating resources for start-ups and small businesses to navigate the permitting process for the first time, through dedicated orientations or a set of tools online.
Funding Sources	Requires funding for additional staff, IT support for system changes to the permitting platform, and support to create resources and direct assistance to businesses navigating systems.
Potential Partners	N/A
Metrics	<ul style="list-style-type: none">• Application acceptance rate• Application processing/completion time

RECOMMENDATIONS | Regulatory Action

LONG-TERM: Advocate for legislation that prioritizes: i) regional purchasing, and ii) procurement from minority-owned businesses.

Existing County Response	Fairfax County does not yet set aside a portion of its procurements or procurement budget for regional purchasing or small or minority-owned businesses because state-level legislation is required. However, the Department of Procurement and Materials Management (DPMM) is actively thinking about how to engage more local businesses with county opportunities. Their work to-date includes outreach to local business communities in their “Doing Business with Fairfax County 101” series, holding the Reverse Trade Fair, and digital promotion of the county’s contracting website.
Description	<p>Utilizing direct County and public-sector partners’ purchasing power to support local businesses, and particularly minority-owned businesses, sends a powerful message about the County’s direct investment in the local economy. While this is not yet legally allowable in the Commonwealth of Virginia, the County should advocate for legislative changes that would enable such policies. The future policy would either (1) set aside a certain percentage of each contract or annual County spending to be spent purchasing from local, small, and/or minority-owned businesses or (2) indicate a purchasing preference for local, small, and/or minority-owned businesses.</p> <p>After demonstrating leadership in this area, the County could encourage other regional stakeholders (other County governments, universities, school districts, corporations, etc.) to participate and join in pledging to make a similar commitment. The County could also work with these partners to formalize a regional purchasing network that centralizes a database of local and minority-owned business and streamlines the regional procurement process.</p>
Funding Sources	No new funding
Potential Partners	N/A
Metrics	<ul style="list-style-type: none">• Direct spending in Fairfax County by the County and partners who take a local purchasing commitment• Direct spending with Fairfax County minority-owned businesses by the County and partners• Jobs supported in Fairfax County based on County expenditures

RECOMMENDATIONS | Workforce & Talent Support

FIRST MOVE: Leverage County resources to link job seekers with employment opportunities by hiring local workers to support pandemic recovery efforts.

Existing County Response	The County and FCEDA are leading and involved in numerous local, regional, and statewide efforts to promote job opportunities, including through FCEDA online career fairs, a County-established Business Resiliency Roundtable, and participation in the now-expired Re-Employing Virginians (REV) Initiative, focusing on jobs in health care, information technology, skilled traders, public safety, and early childhood education.
Description	The County can influence recovery and help connect displaced workers to available job opportunities by leveraging its role as a major employer in the local area through both temporary and potentially permanent hiring. Initiatives may include: <ul style="list-style-type: none">• Contracting with local artists and other cultural workers to put on public performances, create public service announcements, and create content for communication campaigns and public health marketing, related to the pandemic and other public service campaigns that should reach a broad audience (for instance, around health insurance, health services, etc.).• Continuing efforts to employing local workers displaced during the pandemic for urgent pandemic-related initiatives such as contact tracing or administration related to vaccine rollout. The County should collaborate with private-sector partners working on these initiatives to match candidates with potential long-term opportunities after the immediate, pandemic-driven need for services subsides.• Working with private developers to secure commitments for local hiring (for construction and ongoing operations) on upcoming development and redevelopment projects that are already in the pipeline. These agreements could establish a precedent for future negotiations.

Continued...

RECOMMENDATIONS | Workforce & Talent Support

FIRST MOVE: Leverage County resources to link job seekers with employment opportunities by hiring local workers to support pandemic recovery efforts.

Continued...

Funding Sources	Remaining Federal stimulus funding, if any; State and County operating funds; leverage partnership with local and national philanthropic partners.
Potential Partners	Requires collaboration with employers throughout the county
Metrics	<ul style="list-style-type: none">• Overall employment/unemployment rates throughout recovery• Median wage trends throughout the County, overall and by race/ethnicity• # direct County hires (temporary and permanent)• Local hiring statistics for real estate development and redevelopment projects

RECOMMENDATIONS | Workforce & Talent Support

FIRST MOVE: Leverage County resources to link job seekers with employment opportunities by hiring local workers to support pandemic recovery efforts.



The City of Lancaster is commissioning 10 **artists to develop creative messaging** to convey essential COVID-19 related messaging to the public.



Sacramento created an online portal for **entrepreneurs to submit ideas for innovative COVID-19 business ideas**. Similar entrepreneur challenges have been implemented in Spain, Germany, and France soliciting ideas for facing the economic reality after the pandemic.



Mexico City has committed \$1B to create a **million jobs** in the construction sector for publicly funded redevelopment projects in 13 urban corridors.

RECOMMENDATIONS | Workforce & Talent Support

FIRST MOVE: Leverage County resources to link job seekers with employment opportunities by strengthening job training and placement programs, focusing on individuals and communities impacted by the pandemic.

Existing County Response	<p>(See slide 70)</p> <p>There is additional funding coming through the Community College System to the County via the REV Grant, Rapid Response, and National Dislocated Worker Grants that the Department of Family Services has been operating to strengthen job training.</p>
Description	<p>The County's involvement in connecting local workers with employment opportunities can help to streamline the many resources available to workers, improving their uptake and helping job-seekers to identify the right trainings, placement programs, or other resources they need to navigate the job search in this challenging environment. These efforts should also align with Workforce Investment Board, as the recognized regional convener on workforce development. Initiatives may include:</p> <ul style="list-style-type: none">• Building on previous efforts, such as Tech Pathways or the NOVA Tech-Talent Pipeline Initiative, create a digital campaign that communicates the existing job training and/or certifications programs within the county for specific entry-level and middle-skill career paths, reflecting the skillset or education/training level of workers in industries that lost the greatest number of jobs. The campaign should also highlight opportunities for upward economic mobility in positions or trainings offered.• Creating a grant or stipend program to support workers interested in participating in these training and/or certifications programs. This can be accomplished through direct funding to individuals or negotiating discounted rates or subscriptions from providers.• Creating a local "jobs corps" for specific emerging sectors based on employer needs (for instance, clean energy employers seeking a local workforce). The job corps should be place-based, designed to recruit local individuals particularly in low-income areas and communities of color, provide intensive hands-on training, career guidance, and counseling, create a robust pipeline of diverse workforce candidates, and offer direct connections to employers who are hiring in relevant sectors.

Continued...

RECOMMENDATIONS | Workforce & Talent Support

FIRST MOVE: Leverage County resources to link job seekers with employment opportunities by strengthening job training and placement programs, focusing on individuals and communities impacted by the pandemic.

Continued...

Description (continued)	<ul style="list-style-type: none">Helping to seed an apprenticeship program that creates a pathway from entry level to professional level in a given job sector, particularly competitive sectors. This will require private-sector engagement and champions.
Funding Sources	Remaining Federal stimulus funding, if any; State and County operating funds, including GO Virginia funding for one-time investments or pilot projects; leverage partnership with local and national philanthropic partners.
Potential Partners	Requires collaboration with major employers, local higher education institutions (Northern Virginia Community College, George Mason University, and potentially others such as University of Virginia), and State employment organizations (Virginia Employment Commission and others).
Metrics	<ul style="list-style-type: none">Overall employment/unemployment rates throughout recoveryMedian wage trends throughout the County, overall and by race/ethnicityEnrollment in training and certification programs

PRECEDENTS | Workforce & Talent Support

FIRST MOVE: Leverage County resources to link job seekers with employment opportunities by strengthening job training and placement programs, focusing on individuals and communities impacted by the pandemic.



California began piloting **Green Jobs Corps**, providing green jobs training for youth. A key part of the program is the requirement for multi-sector partnerships in a way that leverages the strengths of different types of entities. For example, local business support organizations outreach targeted populations, community colleges teach relevant programs, non-profit providers offer wrap around services, and private businesses help ensure that training programs stay focused on meeting actual employer needs.



San Antonio partnered with workforce development agencies to offer free workforce training and education to San Antonio residents who have been impacted by the pandemic. Qualified participants are eligible to receive stipends of \$15 per hour for actual time spent in an approved training program, up to a maximum of \$450 a week.



Hot Bread Kitchen is a commercial bakery and small business incubator in Brooklyn, NY that has created over 300 jobs through its training programs. The program focuses on creating more equity in the food industry by offering opportunities for women, including job placement and access to space and networks. The organization also works with employers and businesses across the food ecosystem to shift toward more equitable policies and practices.
Note: Program was established pre-COVID.

RECOMMENDATIONS | Workforce & Talent Support

MID-TERM: Coordinate improvements to certification and skills-based job training and reskilling programs and bring these opportunities to low-income communities and communities of color.

Existing County Response

(See slide 70)

Description

While many programs exist for job training and reskilling in and around Fairfax County, stakeholders conveyed the need for a coordinated, targeted strategy that is focused on stable and opportunity industries, is easily and clearly communicated to job seekers, and is accessible to job seekers throughout the county, not just around existing commercial centers and higher-income areas. The County and its partners should act as a convener of job training providers, major employers, and regional academic institutions (listed on slide 66) to:

- Gather and consolidate data about current and projected employer needs.
- Gather and streamline information about current job training, certification, continuing education, and reskilling programs.
- Align employer needs with existing programs to identify clear pathways for job seekers into new industries and occupations and identify gaps.
- Roll out a campaign to communicate existing and new opportunities directly to low-income communities and communities of color, and assist interested job seekers in accessing these programs (online or through bringing programming to neighborhoods in these communities).
- Track program progress against goals and key metrics, and to evolve the program as employer needs change.
- Creating a local “jobs corps” for specific emerging sectors based on employer needs (for instance, clean energy employers seeking a local workforce) and for traditional sectors experiencing local workforce shortages (for instance, nursing or education).

RECOMMENDATIONS | Workforce & Talent Support

MID-TERM: Coordinate improvements to certification and skills-based job training and reskilling programs, and bring these opportunities to low-income communities and communities of color.

Continued...

Funding Sources	State and County funds, including potentially GO Virginia funding; leverage partnership with local and national philanthropic partners
Potential Partners	Same as slide 71, with additional emphasis on regional and state-level partnerships, including with NoVA EDA, VEC, Northern Virginia Community College, GMU, and others
Metrics	<ul style="list-style-type: none">• # of participants in local job training, certification, reskilling, and continuing education programs• Unemployment rate• Labor force utilization rate• Enrollment in training and certification programs by industry• Change in median household income, total and by race• Median wage or household income, total and by race

RECOMMENDATIONS | Workforce & Talent Support

MID-TERM: Pilot a neighborhood job and entrepreneur center, building toward a long-term investment strategy to be deployed throughout the County.

Existing County Response	(See slide 70)
Description	<p>To link the County’s immediate pandemic recovery efforts with its long-term innovation and growth plans, the County should develop a pilot program to house its workforce and talent support initiatives within physical hubs throughout the county. These spaces, which would be designed as neighborhood centers for job resources and entrepreneur accelerators, should eventually comprise a network of multiple locations throughout the region that align with existing and future employment and innovation hubs. To start, the County should focus on a pilot for this initiative that can test the viability of the long-term vision. The centers should serve two primary purposes that will sustain and expand upon the other workforce and talent support initiatives noted in this study and already underway.</p> <ul style="list-style-type: none">• Provide a one-stop shop for job resources including training, placement, and counseling programs offered by nonprofit and workforce development partners and County resources offered to workers in this are such as information on any ongoing grant programs and/or local jobs corps programs.• Provide a one-stop shop for entrepreneurs including makerspace and coworking facilities as well as accelerator, incubator, and mentorship programs.
Funding Sources	Remaining Federal stimulus funding, if any; State and County operating funds, including GO Virginia funding for one-time investments or pilot projects; leverage partnership with local and national philanthropic partners.
Potential Partners	Requires collaboration with employers, entrepreneurs, and business support providers throughout the county
Metrics	<ul style="list-style-type: none">• Overall employment/unemployment rates throughout recovery• Median wage trends throughout the County, overall and by race/ethnicity• # of workers and entrepreneurs served by the center• New business trends throughout the County, overall and by race/ethnicity

RECOMMENDATIONS | Support for Workers & Families

MID-TERM: Expand access to affordable childcare to enable more parents, particularly women, to take part in the workforce.

Existing County Response	The Office of Children has previously studied the landscape of childcare providers in the county and has identified improving access to childcare as a crucial part of the County’s strategic plan. The Supporting Return to School Program offers full-day on-site programming for children in K through 6 to support virtual learning. Pricing is based on income.
Description	~39% of Fairfax County households live in childcare deserts, but further analysis of true supply and demand by these households is needed to assess the extent of childcare accessibility as a challenge to working parents. Even for those for whom accessibility is not the challenge, affordability may be, as families are likely to spend an outsized share of their income on childcare. Safe, accessible, affordable childcare is necessary to ensure that caretakers can remain active in the workforce, particularly for women. The County can support caretakers/workers by: <ul style="list-style-type: none">• Expanding eligibility for the Child Care Assistance and Referral (CCAR) program to families who have been impacted by the pandemic.• Encouraging employers throughout the county to offer childcare support services, flexible work hours, and other accommodations to keep parents in the workforce.• Assessing the need for additional childcare centers throughout the county, and potentially creating or funding those directly.• Prioritizing childcare providers (for-profit and non-profit) in future rounds of grant and loan funding (based on potential future federal funding) to increase chances of business survival.
Funding Sources	Potentially future federal stimulus funds, along with County funding

Continued...

RECOMMENDATIONS | Support for Workers & Families

MID-TERM: Expand access to affordable childcare to enable more parents, particularly women, to take part in the workforce.

Continued...

Potential Partners	Requires collaboration with major employers and existing childcare providers.
Metrics	<ul style="list-style-type: none">• Presence of childcare deserts throughout the county• Share of household income spend on childcare• Avg. distance of childcare centers to parents' work vs. home.• Households with children under 6

RECOMMENDATIONS | Support for Workers & Families

MID-TERM: Partner with internet service providers to ensure that all Fairfax County residents can access affordable internet service and digital literacy programs, a key to accessing economic opportunities.

Existing County Response

Fairfax County and Fairfax County Public Schools have worked to provide Wi-Fi hotspots and internet access for students, expand access to the internet at locations throughout the county, such as in public libraries and community centers, and provide digital literacy courses. The Fairfax County Public Library also expanded Wi-Fi broadcast hours and is currently working to increase exterior Wi-Fi signals to allow better access from library parking lots.

Description

While internet service is available through internet service providers (ISPs) throughout most of Fairfax County, and affordable options exist for low-income households, households in low-income areas of the county and areas with a higher rate of populations of color have lower rates of subscription to an internet service than their wealthier, whiter counterparts. This may be due to a number of factors, including affordability, type of housing (homes that do not allow certain types of service), and others. This challenge may also be exacerbated by the pandemic, as households where an adult has lost a job may not be able to qualify for a low-income internet service if they previously subscribed at the “market” rate. Given that internet access is essential, especially now, the County should take steps to make internet service more accessible and affordable to all residents by:

- Reducing the costs of internet service for Fairfax County residents, either through direct agreements with ISPs to establish lower rate plans for Fairfax County residents currently experiencing unemployment due to the pandemic, regardless of income level or prior subscription, or by directly providing “refunds” to Fairfax County households to reduce their cost of internet service while experiencing unemployment or reduced income due to the pandemic.
- Launching a mobile hotspot borrowing system through the public library system.
- Expanding digital literacy courses to all age groups and in various languages.

Continued...

RECOMMENDATIONS | Support for Workers & Families

MID-TERM: Partner with internet service providers to ensure that all Fairfax County residents can access affordable internet service and digital literacy programs, a key to accessing economic opportunities.

Continued...

Funding Sources	If needed, direct County funding (through stimulus funds); upfront cost of purchasing mobile hotspots; State/County operating funds related to digital literacy courses, or work in partnership with local non-profits and community organizations
Potential Partners	Internet Service Providers (ISPs)
Metrics	<ul style="list-style-type: none">• Share of residents with an internet subscription• Average household cost for internet service• Cost of internet service as a share of household income

RECOMMENDATIONS | Support for Workers & Families

LONG-TERM: Commitment to and Implementation of Affordable Housing Production Goals.

Existing County Response

Fairfax County has committed to a variety of policies and strategies focused on preserving and expanding affordable, healthy housing opportunities for people living and working in Fairfax County, which can be leveraged as part of the recovery process.

Description

The long-term loss of employment caused by the pandemic, particularly in low-paying service sector jobs, are identified causes of housing instability across the county, exacerbating the challenges for low- and moderate-income workers in what is already one of the most expensive housing markets in the nation. Immediate and longer-term strategies to support the existing Communitywide Housing Plans include:

- Continuing towards the goal to produce at least 5,000 new homes affordable to households earning up to 60% AMI over by 2034;
- Continuing to commit to no-net-loss of existing affordable housing in the community; ensuring access to healthy, affordable homes,
- Committing substantial additional local funds to support affordable housing preservation and production, consistent with the recommendations of the Affordable Housing Resources Panel and the Affordable Housing Preservation Task Force;
- Supporting the proposed Virginia Housing Opportunity Tax Credit;
- Supporting the conversion of underutilized/vacant office/commercial buildings into affordable housing;
- Expanding the availability of down-payment and closing cost assistance to low- and moderate-income homebuyers;
- Expanding the supply of prospective Housing Choice Voucher landlords with a marketing program that highlights (1) source of income as a protected class and (2) the Virginia Communities of Opportunity Tax Credit; and
- Supporting expansion of rental assistance programs that 1) assist residents and workers with the economic strain of housing costs to ensure they are able to remain in their existing homes, and 2) help federal program participants transition to market-rate housing.

Continued...

RECOMMENDATIONS | Support for Workers & Families

LONG-TERM: Commitment to and Implementation of Affordable Housing Production Goals.

Continued...

Funding Sources	Federal, state and local resources are required to address housing production and preservation, including but not limited to the Low-Income Housing Tax Credit program, the federal Housing Choice Voucher program, and the local Affordable Housing Development/Investment Fund.
Potential Partners	Development community, including most particularly affordable housing developers, community-based organizations, and federal and state housing agencies.
Metrics	<ul style="list-style-type: none">• # of new affordable housing units developed• # of existing market affordable housing units preserved as committed affordable housing• # of existing committed affordable housing units renovated and/or with affordability extended• # of Housing Choice Voucher participant families moving to high-opportunity areas• # of low- and moderate-homebuyers purchasing homes in Fairfax County

RECOMMENDATIONS | Support for Workers & Families

LONG-TERM: Create efficient and integrated client-facing access to Fairfax County and partner-provided health, housing, and human services.

Existing County Response

The County provides a wide array of programs and services to help residents disproportionately impacted by the COVID-19 pandemic. In addition to the extensive local public health response to the crisis, social services nonprofits in collaboration with the County have distributed >\$18M in federal Cares Act funding to support financial instability, housing instability and other basic needs of residents. Additionally, the County established temporary housing for residents who could not safely isolate or quarantine at home. Early in the pandemic response, nonprofits, faith-based organizations, and County agencies came together to identify gaps, share information, and connect providers with emerging resources for families. A communication framework was built around the needs of the community for food, financial assistance, health care, transportation, and youth programming. Still opportunities exist to streamline services, create efficiencies for service providers, and improve access for residents. Workers and families must interact with complicated service delivery systems in times of crisis. The county and its partners should work to make this experience easy to understand for workers and families at all literacy levels and in multiple languages.

Description

To ensure an integrated and efficient access to services the County should work to align service delivery systems. This should include:

- Improvements in access, such as “no wrong door” or establishing a single, centralized point of access for residents seeking health and human services from the county or nonprofit providers.
- Continuing to support the HHS IT Strategic Roadmap for development multimodal, integrated access that would allow residents and providers to manage information more efficiently.
- More efficiently link individuals through technology to other resources (including job counseling, training, and placement resources) when appropriate. This system may also help the County and non-profit service provider partners collaborate more efficiently.

Continued...

RECOMMENDATIONS | Support for Workers & Families

LONG-TERM: Create efficient and integrated client-facing access to Fairfax County and partner-provided health, housing, and human services.

Continued...

Description (continued)	<ul style="list-style-type: none">• Continuing to provide assistance-from-a-distance and streamline ways for clients to share eligibility and health information safely in order to improve the health safety net Striving for equitable geographic distribution of services in order to reduce barriers to access and strategically invest in areas identified as communities of opportunity, as well as leverage on-going efforts to update the County’s Comprehensive Plan to ensure land use policies promote community overall health.• applying a Health in All Policies lens and leveraging on-going efforts to update the County’s Comprehensive Plan to ensure land use policies align with HHS system priorities, reduce inequities and improve health outcomes.
Funding Sources	State and County operating funds, including potentially funds targeted specifically toward improving economic, equity, and health outcomes in the wake of the pandemic; leverage partnership with local and national philanthropic partners focused on improving health outcomes.
Potential Partners	Non-profit service providers would be partners and participants. The business community and large health systems could also be partners - Requires coordination <i>among outreach staff and community liaisons in various county agencies</i> , local chambers, local development corporations, local advocacy groups and community associations, and business support organizations within individual communities.
Metrics	<ul style="list-style-type: none">• # County departments integrated into the system• # residents receiving supports for financial instability, housing instability and other basic needs• # of non-County service provider partners using provider portal for access and communication with clients• Resident feedback on ease of access to supports and services• Resident feedback on satisfaction with service delivery

RECOMMENDATIONS | Physical & Community Planning

MID to LONG-TERM: Support corridor-level recovery by establishing “boots on the ground” corridor teams to provide day to day support to businesses.

Existing County Response	The Fairfax County Community Revitalization Section of the Fairfax County Department of Planning and Development has clear priorities and services to deploy across the County and commercial revitalization districts, areas, and transit station areas, and within major commercial nodes.
Description	<p>To support these ongoing efforts, the County can provide supplemental support in the form of “boots on the ground” corridor team that will help support day to day management of activities and local business engagement. These corridor teams may require the formation of new entities or, in the cases where an entity already exists, take the form of expanded public-private partnerships with Chambers of Commerce and/or continued coordination with local development corporations charged with overseeing development of specific districts or corridors (Tysons Corner, etc). The corridor teams would effectively provide dedicated focus to these crucial commercial corridors and be responsible for a range of activities:</p> <ul style="list-style-type: none">• Developing standardized data collection and reporting mechanisms to track corridor-level impacts such as business vacancy. This will allow the County to understand the extent of impacts within specific geographies and help target long-term planning efforts.• Engaging with local and independent businesses to support attraction and retention within the commercial corridor and assist businesses with accessing financial, technical, or other resources the County and its partners can provide will simultaneously identifying any strategic gaps in the landscape of resources.• Convene corridor partners to execute on placemaking opportunities (public art, pop-up parks, concerts, etc) and execute on Community Revitalization’s place-based resiliency plans. This will allow the County to track day to day accountability for implementation of these plans.

Continued...

RECOMMENDATIONS | Physical & Community Planning

MID to LONG-TERM: Support corridor-level recovery by establishing “boots on the ground” corridor teams to provide day to day support to businesses.

Continued...

Funding Sources	Stimulus funds, as available to support recovery planning; State and/or County funds focused on equity, recovery planning, and transit/pedestrian infrastructure; local and national philanthropic partners focused on community-level resilience.
Potential Partners	Requires coordination with local chambers, local development corporations, local advocacy groups and community associations, and business support organizations within individual communities.
Metrics	<ul style="list-style-type: none">• Community/corridor-level commercial vacancy rate• Community/corridor-level business closure rates• Community/corridor-level new business formation rates• Presence of community services/amenities in community/corridor (such as a Walk Score or other measurement)• Community/corridor-level jobs• Community/corridor-level employer locating/relocating• Community/corridor-level residents• Community/corridor-level real estate market strength• Community/corridor-level equity and inclusion indicators

RECOMMENDATIONS | Physical & Community Planning

MID to LONG-TERM: Strategically employ a Health in All Policies approach to community development.

Existing County Response	The county’s Chief Equity Officer, together with the Office of Strategic Management and the Fairfax County Health Department, are working across county agencies to integrate equity and health objectives into plans, policies, and projects of all sizes as part of a long-term strategy to address structural inequities by race and place and improve mental, social, and economic wellbeing.
Description	<p>Together with the “boots on the ground” efforts, collaborating across county agencies and with key private sector partners to integrate equity and health objectives will result in a more sustainable, and equitable recovery.</p> <ul style="list-style-type: none">• Leverage on-going efforts to update the County’s Comprehensive Plan to ensure land use policies promote community overall health, reduce inequities and improve health outcomes, particularly in Communities of Opportunity.• Collaborate with public and private developers to deliver buildings and infrastructure that promote healthy communities, especially in revitalization districts and designated Communities of Opportunity.• Address pedestrian safety in high-risk corridors and support placemaking through improved pedestrian facilities.• Activate revitalization corridors and Communities of Opportunity with a focus on connectivity to transit, healthy foods, recreation, and jobs, particularly for residents hit hardest by the pandemic.• Addressing pedestrian safety through better infrastructure. Including health and equity goals and outcomes in plans, policies, and projects.

Continued...

RECOMMENDATIONS | Physical & Community Planning

MID to LONG-TERM: Strategically employ a Health in All Policies approach to community development.

Continued...

Funding Sources	Stimulus funds, as available to support recovery planning; State and/or County funds focused on recovery planning; partnerships with local and national philanthropic partners focused on community-level resilience.
Potential Partners	Requires coordination with development agencies, public and private developers, health systems, financial institutions, local development corporations, local advocacy groups and non-profit service providers, business support organizations within individual communities, and residents.
Metrics	<ul style="list-style-type: none">• Residents with access to grocery, transit and recreation• # of equity- and health-promoting goals and objectives included in plans, policies, and development projects• # pedestrian related crashes and deaths

RECOMMENDATIONS | Long-Term Initiatives

To supplement the priority recommendations outlined on the previous pages, the County should also consider the following long-term initiatives that will continue to enhance the region's resiliency in a post-pandemic future.

- Incentives or funding for businesses that expand or locate within Fairfax County, including businesses that invest in the neighborhoods hardest-hit by the pandemic or within targeted opportunity zones.
- Support the start-up ecosystem and ensure the support network of resources is in place to integrate workers and local enterprises into competitive sectors and clusters. This includes mechanisms for providing access to capital for start-ups. A focus on early-stage business growth will help diversify the economy and build on the County's competitive assets.
- Help existing businesses identify opportunities for expanding into international markets. This comprehensive resource program would consider services as well as products for potential exports and sales. International expansion will help make Fairfax County businesses and the region's future economy more resilient to localized economic shocks.
- Continue to enhance the County's business permitting process with the goal of improving efficiency and customer service. This should include clear standards and processes as well as continued staff training focused on effectively utilizing the PLUS system and Project DOX.
- Continue to invest in areas of economic strength to ensure continued competitiveness as office and mixed-use districts transition to accommodate the future of work and urban life post-pandemic.

Additionally, the County should prepare for the use and distribution of additional federal stimulus funding, focusing on the following initiatives designed to promote economic security.

- Additional loan or grant funding for small and local businesses in the hardest-hit communities.
- Rental assistance programs that could assist residents and workers with the strain of housing costs and ensure they are able to remain in their existing places of residence even under economic strain.
- Additional housing support programs for rapid re-housing and/or other wrap-around services that help connect families in need with stable and affordable housing options.

Executive Summary

Pre-Pandemic Conditions

Economic Impact of the COVID-19 Pandemic

Overall Impact

Impact on Industry & Employers

Impact on Workforce & Talent

Federal, Regional, and Local Response

Looking to the Future

Recommendations Overview

Recommendations Detail

Appendix

APPENDIX | Economic Impact Analysis Approach

The unprecedented nature of the COVID-19 crisis is rewriting the fundamental patterns of local economies in real-time, requiring new approaches to projecting impact. Our analysis therefore draws upon a variety of data sources to quantify the economic impact of COVID-19 on Fairfax County.

- To estimate the **initial economic shock of COVID-19 by sector**, HR&A relied primarily on weekly continued unemployment insurance claims from the Virginia Employment Commission's Labor Market Information resource ([linked](#)). Job losses and job recoveries were based on the incremental change in these weekly unemployment insurance claims, and HR&A also tracked continued unemployment claims.
- To quantify the **combined industry effects** across the three phases of economic shock, recovery, and stabilization, HR&A used IMPLAN, an industry standard input-output modeling program to estimate the collective economic impacts on Fairfax County.
- To evaluate the **disparate impacts** of these job losses and economic impacts across different segments of the Fairfax County's population and workforce, HR&A analyzed the distribution of these effects across variables such as race, income, education level, and training level using data from the U.S. Bureau of Labor Statistics ([linked](#)), including the Quarterly Census of Employment and Wages (QCEW) and Occupational Employment Statistics (OES) reports and data, and [EMSI](#), a third-party data provider, from which HR&A used EMSI Staffing Patterns data and Input-Output multipliers.

APPENDIX | Industry Definitions

The analysis of office-based jobs uses the North American Industry Classification System (NAICS) to evaluate employment by industry and sub-industry. Primary industries are defined at the two-digit NAICS level. More detailed sub-industries are defined at the four-digit NAICS level and fit within the umbrella of two-digit categories. HR&A defined 83 office-using sub-industries within 10 primary industries.

OFFICE-USING INDUSTRY NAICS CODES

2-Digit NAICS	Industry	Example Sub-Industries
51	Information	Software Publishers, Radio and Television Broadcasting, Newspaper Publishers, and Data Processing
54	Prof., Scientific, and Technical Services	Computer Systems Design, Scientific Research, Legal Services, Accounting, Management Consulting Services, Advertising and Public Relations
52	Finance and Insurance	Monetary Authorities, Credit Intermediation, Securities and Commodity Exchanges, Insurance Carriers, Investment Pools and Funds
53	Real Estate and Rental and Leasing	Lessors of Real Estate
55	Management of Companies	Management of Companies and Enterprises
56	Administrative and Support	Office Administrative Services, Employment Services, Travel Arrangement Services, Business Support Services
61	Educational Services	Educational Support Services*
62	Health Care and Social Assistance	Medical and Diagnostic Laboratories, Offices of Physicians and Health Care Practitioners, Home Health Care Services, Community Food and Housing Services
81	Other Services (Excl. Public Admin.)	Religious Organizations, Grantmaking and Giving Services, Social Advocacy Organizations, Business/Professional/Political Organizations
90	Government	Federal Government (Civilian and Military), State Government

*Traditional educational employment that occurs outside an office (i.e. teaching) was excluded from the analysis

APPENDIX | Stakeholder Engagement

HR&A conducted a series of virtual roundtables with local stakeholders who bring varied experiences of the pandemic and ideas for recovery. HR&A also received input from a questionnaire sent to interested participants who were not available for roundtables. We thank all of the stakeholders who participated in this outreach process, listed below. Additionally, this report benefited from the contributions of all members of the Fairfax County Board of Supervisors, the Fairfax County Economic Advisory Commission, the Fairfax County Small Business Commission, and the Fairfax County Economic Development Authority Commission.

County Officials & Civic Leaders

- Fairfax County Chief Equity Officer
- Fairfax County Department of Planning & Development
- Fairfax County Facilities Management Department
- Fairfax County Housing & Community Development
- Fairfax County Land Development Services
- Arc of Northern Virginia
- Community Foundation for Northern Virginia
- Arts Fairfax
- Visit Fairfax
- Edu-Futuro
- Britepaths

County & Non-Profit Health Service Providers

- Fairfax County Health Department
- Cornerstones, Inc.
- Northern Virginia Family Service
- North Virginia Health Foundation
- Reston Community Center

Major Employers

- BF Saul Company Hospitality Group
- Boston Properties
- Great American Restaurants
- Holland & Knight

Small Businesses

- Bauza Accounting
- Belle Jar Design
- Caison Janitorial, Inc.
- Fava Pot
- Infina, Ltd.
- Interstate Moving & Logistics
- Lake Anne Brew House
- Ono Brewing Company
- SOAR Community Network
- Strategy and Management Services

Business Support/Minority Chambers

- Korean-American Chamber of Commerce VA
- Mason Small Business Center
- NOVA Chamber

Higher Education

- George Mason University
- Northern Virginia Community College

APPENDIX | Stakeholder Engagement

COUNTY OFFICIALS & CIVIC LEADERS

- Key Impacts
- Key Opportunities

“There have been disproportionate impacts on **Latinx, Hispanic, and immigrant communities**, in part due to these individuals’ employment in essential industries...”

“There were residents who were struggling prior to the pandemic, but now a wave of **newly vulnerable households** have also emerged...”

“**Tourism and restaurant industries** were hit particularly hard relative to other sectors...”

“Many households cannot afford **access to the internet** and lack basic digital literacy skills...”

“**Target resources** towards the hardest hit industries. This is key since other industries like tech are thriving...”

“**Continue to invest in programs** that support economic mobility and enrich residents’ lives (job training, continuing education, disability support resources) despite budget shortfalls...”

APPENDIX | Stakeholder Engagement

COUNTY & NON-PROFIT HEALTH SERVICE PROVIDERS

- Key Impacts
- Key Opportunities

“The pandemic has **strained the capacity** of service providers in terms of staff and funding...”

“**Raising funds** over the next year to sustain increased levels of service will be challenging, as recovery funds are running out and there is likely to be a drop in giving...”

“The virtual economy has made **outreach more challenging**, but there have been some opportunities for **additional connections between the private and public sector...**”

“Consider the **health impacts** that arise from the work of various county departments and coordinate planning across departments...”

“Streamline services where possible and adopt strategies that **enhance the efficiency of service provision** to populations in need...”

“Provide **funding that offers greater timeframe flexibility** and **less cumbersome reporting requirements** to build more sustainable support...”

APPENDIX | Stakeholder Engagement

MAJOR EMPLOYERS

- Key Impacts
- Key Opportunities

“While professional service firms have fared relatively well, **other industries are in crisis...**”

“**Decisions on real estate space needs and upgrades are being deferred** until there is more certainty about the future...”

“There is a stunning liquidity crisis and **recovery will vary** across industries...”

“Establish messaging around reopening employment centers to **rebuild consumer confidence...**”

“**Create a universal solution** that eliminates the need for filing individual property valuation appeals in 2021...”

“**Double down on investment** in tourism and leisure travel...”

“Increase the efficiency of the permitting process and **eliminate unknowns** for all industries that are adapting their physical spaces...”

“Continuing to **prioritize business attraction and retention...**”

APPENDIX | Stakeholder Engagement

SMALL BUSINESSES & BUSINESS SUPPORT

- Key Impacts
- Key Opportunities

“Securing adequate and sustainable funding is an ongoing challenge...”

“Consumer confidence is still low, stifling patronage of local and minority-owned businesses...”

“Talent attraction, development, and day to day staffing have become more challenging during the pandemic...”

“Business support services have shifted to survival mode for most providers...”

“Our customer base includes many of the hardest-hit industries, so we are feeling the ripple effects up and down the supply chain as restaurants and hotels struggle...”

“A lack of childcare support is restricting the available workforce...”

“Put together safety guidelines that offer clarity on workplace safety and to reassure customers...”

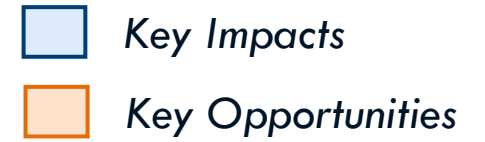
“Reach out to businesses with unified messaging and a “one-stop shop” for resources...”

“Streamline online permitting and offer more guidance to ensure that delays do not stand in the way of businesses making necessary changes to reopen...”

“Advocate for rent deferment or arrange some other deal between landlords and small business owners...”

APPENDIX | Stakeholder Engagement

HIGHER EDUCATION



“The pandemic has resulted in **more last-minute decisions from students**, impacting school enrollment...”

“**Uncertainty around receiving sufficient funding** from the State Legislature...”

“Many students do not have the necessary **resources to learn remotely and online...**”

“Schools are beginning to **reevaluate how they use institutional real estate...**”

“Curriculums will likely shift to **focus on retraining and reeducating** for a wave of new jobs...”

“Advocate for and become a partner in **addressing the digital divide...**”

“**Support new workforce training, upskilling, and reskilling** that offers creative solutions to the potential shift in job opportunities...”

“Build on the healthy competition with other Northern Virginia EDAs and **build partnerships that strengthen the brand of the institutions...**”

“**Advocate at the state level** to ensure each institution receives enough funds to sustain support for their student populations...”

APPENDIX | Recovery Program Precedents

Business Recovery and Resilience

San Diego Small Business Relief Fund Allocations	San Diego, CA	San Diego is allocating half of its Small Business Relief Fund in areas that are Promise Zones, Opportunity Zones, or Low- & Moderate-Income Census Tracts.
City of Phoenix Office of Arts and Culture Emergency Relief Grants	Phoenix, AZ	The City of Phoenix provided grants to nonprofit arts and culture organizations. The City also set aside funds to contract consultants and facilitators to conduct workshops, webinars, and resources that would help nonprofit arts and culture organizations and individual artists navigate their financial futures moving forward into the new normal.
Portland Digital Divide Workgroup	Portland, OR	At the onset of the pandemic, the City of Portland launched a digital divide workgroup in response to COVID-19 in which their equity consulting advisors (hired pre-pandemic) could immediately plug into the community to reshape outreach language and facilitate active participation. The workgroup focused on internet access for community members and community organizations.
NYC Vaccine Tracker	New York City, NY	In mid-December, New York City launched a new online tool that provides a daily snapshot of COVID-19 vaccine doses administered within the city. Multiple states, counties, and other cities have followed suit including the State of Texas, Maricopa County, AZ, and more.
Buy Miami	Miami, FL	Miami launched a Buy Miami promotional program, which offers small businesses free, individualized online promotional listings on a new website. The program aims to help local small businesses recover, while offering special deals to customers.
#TampasDowntownCurbside Social Media Campaign	Tampa, FL	In March, Tampa launched the #TampasDowntownCurbside social media campaign. The campaign uses social media to highlight local restaurants offering takeout menus and allowed followers to stay informed on local businesses.
Caps on Delivery App Fees	Various	In April, San Francisco became the first city to pass an emergency order capping delivery app fees at 15%. Since then, other cities and counties have followed suit (Washington D.C., New York City, Philadelphia, Portland, Seattle, Denver, Chicago and more) restricting third-party food delivery commissions to a set percentage of the order price (these caps range from 5% to 20%). Before these regulations, fees for these services could be as high as 30%.

Regulatory Action

City of Fife Online Permitting Portal	Fife, WA	The City of Fife, WA launched an online permitting webpage and portal to make it easier to submit online applications and track the progress of staff's review. The portal also includes a YouTube training video to ensure it is accessible to everyone.
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APPENDIX | Recovery Program Precedents

Workforce & Talent Support

Band Together	New Orleans, LA	New Orleans organized Band Together, a virtual festival, to support its musicians and local venues.
Curbside Concerts in Columbus	Columbus, OH	The Columbus Music Commission in Ohio organized curbside concerts for elderly residents stuck at home.
City of Lancaster Public Art Messaging	Lancaster, PA	The City of Lancaster is commissioning 10 artists to get essential COVID-19 related messaging to the public.
Austin Creative Worker Relief Grant	Austin, TX	The Austin Creative Worker Relief Grant is a \$3.5 million fund providing \$2,000 grants to help Austin's creative sector workers offset expenses like rent, bills, and groceries.
Green Jobs Corps	California	California began piloting Green Jobs Corps, a regional, public-private partnership, providing green jobs training for youth.
Chicago Regional Business Centers	Chicago, IL	Chicago partnered with five community organizations to support local small businesses, particularly entrepreneurs of color. These organizations became Regional Business Centers, each receiving funding to serve as resource hubs in INVEST South/West neighborhoods. Services include critical licensing information, business counseling, and technical expertise.
Tulsa Remote Worker Recruitment Initiative	Tulsa, OK	Tulsa launched a recruitment initiative aimed at attracting new talent to the city. The program provides grants to remote workers for moving to the city and engaging with the community.
Metrix Learning	Connecticut	The Connecticut Governor's Workforce Council expanded access to Metrix Learning, an online learning platform, to give free access to those receiving unemployment insurance.
Mexico City Construction Jobs for Redevelopment Projects	Mexico City, Mexico	Mexico City has committed \$1B to create a million jobs in the construction sector for redevelopment projects in 13 urban corridors.
Digital Upskill Sacramento Pilot Program	Sacramento, CA	The Digital Upskill Sacramento Pilot Program is a reskilling initiative for those affected by COVID-19, specifically focusing on candidates from underrepresented communities seeking alternative pathways to tech jobs. Participants receive a free laptop over the nine-week program and a digital certificate in IT Support or Data Analytics.
ReSkill MS Program	Mississippi	The ReSkill MS Program uses CARES Act funds to allow residents to receive skills training at Mississippi community colleges.
Nebraska Workforce Retraining Initiative	Nebraska	The Nebraska Workforce Retraining Initiative provides funds to community colleges to enhance training programs that support upskilling, award scholarships to students, and to retain career coaches that will provide proactive assistance to unemployed students.

APPENDIX | Recovery Program Precedents

Support for Workers & Families

Movers & Shakas	Oahu, Hawaii	Movers & Shakas, a state- and company-funding program, is offering free airfare to workers that are willing to spend at least a month on Oahu volunteering with non-profits expanding local capacity.
Project Hope	New York City, NY	At the onset of the pandemic, New York had over 6,000 mental health professionals volunteered to provide free services to those in need. This has now been developed into an official program, Project Hope, a free emotional support hotline that connects residents to crisis counselors.
Emergency Child Care	Seattle and King County, WA	Seattle & King County provide access to free emergency childcare for first responders and essential workers.
Washington State Child Care Collaborative Task Force	Washington	The Washington State Child Care Collaborative Task Force was created to develop policy recommendations to incentivize employer-supported childcare and improve childcare access and affordability.
San Luis Obispo Child Care Needs Assessment	San Luis Obispo, CA	San Luis Obispo County Child Care Planning Council conducted a childcare needs assessment, focusing on services available to children under 12. The assessment identified new and continuing gaps in the childcare system and provided reliable data.
Alabama Broadband Connectivity (ABAC) for Students Program	Alabama	Alabama used CARES Act funds to purchase internet service for low-income households with K-12 students, launching the Alabama Broadband Connectivity (ABC) for Students program.
Mobile Hotspots	Durham, NC	Durham County Library offers mobile hotspots for checkout, providing access for those that do not have internet at home.
Building Healthy Communities Program	Richmond, CA	City of Richmond, CA and 14 other communities in CA participating in the California Endowment's Building Healthy Communities Program.

APPENDIX | Recovery Program Precedents

Physical & Community Planning

Milwaukee Artistic Board-Up Program	Milwaukee, WI	Prior to the pandemic, Milwaukee implemented an Artistic Board-Up Program. The program began after the City hosted a “Board-Up in a Box” workshop for community-based organizations. The workshop focused on training community organizers how to transform vacant property by utilizing art to enhance the building’s appearance. The program has since grown to sponsor the artistic board-up of properties in the Neighborhood Revitalization Strategy Area and in the hardest hit foreclosure areas.
Enabling the City to Return to Work	Dublin, Ireland	In partnership with the National Transport Authority, Dublin created a living framework of mobility proposals that propose additional space for pedestrian areas and safe cycling facilities, as well as ways to maintain a strong public transport network.
South LA Asset Mapping	Los Angeles, CA	In South LA, community members helped conduct an asset analysis by identifying tangible (ex. underutilized commercial corridors, Black-owned businesses, educational facilities) and intangible (ex. community art projects, community organizations) neighborhood assets to support with resources and capacity building.

APPENDIX | Recovery Program Precedents

Other		
Florence Digitization of Municipal Services	Florence, Italy	Florence, Italy has committed to a full digitization of all municipal citizen services. The plan raises the target from the city's current 85% goal to a full 100%
Long Beach Public Library Virtual Early Literacy Program	Long Beach, CA	The Long Beach Public Library is launching a virtual version of its early literacy program focused on children under 5.
New York Restaurant Revitalization Program	New York	The New York Restaurant Revitalization program provides restaurants with short-term payroll support for workers who will prepare meals (including some free) for their communities.
Sittercity	Chicago, IL	In partnership with Sittercity, Chicago launched an online resource for in-home care. The platform connects essential workers with reliable childcare volunteers.
Project Homekey	California	California implemented Project Homekey, in which the state is administering \$600 million in state and federal emergency funds to buy hotels and establish permanent housing facilities for people experiencing homelessness. For example, Alameda County used program funds to acquire a hotel for \$18M. The County is using additional program funds to cover operating costs and will operate the property for at least 5 years.
Hot Bread Kitchen	Brooklyn, NY	Hot Bread Kitchen is a commercial bakery and small business incubator in Brooklyn, NY that has created over 300 jobs through its training programs. The program focuses on creating more equity in the food industry by offering opportunities for women, including job placement and access to space and networks. The organization also works with employers and businesses across the food ecosystem to shift toward more equitable policies and practices.
San Antonio Workforce Training Program	San Antonio, TX	San Antonio partnered with workforce development agencies to offer free workforce training and education to San Antonio residents who have been impacted by the pandemic. Qualified participants are eligible to receive stipends of \$15 per hour for actual time spent in an approved training program, up to a maximum of \$450 a week.



FAIRFAX COUNTY
ECONOMIC DEVELOPMENT AUTHORITY



FAIRFAX COUNTY ECONOMIC RECOVERY FRAMEWORK

HR&A
Analyze. Advise. Act.
