

# Horizon Scanning Committee Report

April 20, 2010

As part of the community's strategic planning process, this report from the Horizon Scanning Committee is intended to provide a set of "mega-trends" that the committee feels will have a significant impact on the Springfield metropolitan area during the next 15-20 years. The primary audience for this report is the set of strategic planning committees currently developing the community's next strategic plan.

To develop this report, the Horizon Scanning Committee identified a set of possible mega-trend topic areas, identified community members with expertise in these areas, and hosted informal meetings/discussions with these individuals. A list of the meetings is attached.

This is not an exhaustive list – there are likely additional mega-trends that will impact our communities over the next few decades and the committee did not have time to meet with experts in all topics of interest. However, the committee recognizes the need to provide this information to the planning committees in a timely manner and feels the mega-trends identified within this report deserve the attention of the strategic planning committees. The following mega-trends are presented in no particular order. This report is one of many inputs the City promised to provide to these committees.

It is important to remember that, while these are current trends, not all of these mega-trends are inevitable. Some can be impacted by civic planning and community involvement. The degree and trajectory of these trends might change depending on the response and will of the citizens.

The Horizon Scanning Committee was a group consisting of community members and City staff, and was formed for a limited amount of time for the purpose stated above. The Committee was composed of the following members:

- Bob Belote, Springfield-Greene County Parks
- Greg Burris, City of Springfield (co-chair)
- Dan Chiles, City Council
- Vince Crunk, City of Springfield, Public Information Office
- Brian Fogle, Community Foundation of the Ozarks
- Andy Ford, Noble and Associates
- Ivis Garcia, Grupo Latinoamericano
- Dawn Hiles, Drury University
- Joe Jenkins, Jenkins Diesel
- Samuel Knox, UNITE
- Andy Lear, BKD/Springfield Area Chamber of Commerce
- Andrea McKinney, Central Trust/Junior League of Springfield
- Jason Morrow, City of Springfield, Information Systems

- Ralph Rognstad, City of Springfield, Planning and Development
- Tim Smith, Greene County (co-chair)
- Luke Westerman, SRC/The Network

Mega-Trend: The Springfield metropolitan area will continue to grow and experience demographic changes; as a community, we will likely become older, more ethnically diverse, and poorer.

- Growth of the Ozarks region will likely continue to occur faster than the rest of the state. Most of the population growth will continue to occur in communities surrounding the City of Springfield.
- The impact of the “Baby Boomers” will be significant as they retire. The older population will be more active than previous generations. This will also increase demand on the healthcare industry and create economic instability since there will be fewer workers, consumers, and taxpayers to support the retired generation.
- We will experience increasing levels of ethnic diversity in our region. However, the rate of ethnic minority growth is expected to remain lower than the rest of the country.
- We will experience a continued in-migration of poverty from rural areas. This could be a result of the various types of social services provided in Springfield that are not available in the surrounding rural areas.
- The “doughnut effect” will continue as significant segments of our community’s wealth and progressive leadership will continue to live just in residential suburbs just outside the Springfield city limits unless annexations occur or there is residential redevelopment activity within the city limits that is attractive to higher-income populations.
- Income levels will continue to be depressed unless significant changes occur in our community’s economic development strategies and aggressiveness. The cost of living will likely remain low relative to many other areas, contributing to the in-migration of new residents seeking to enjoy the higher quality of life and lower cost of living our region provides.
- There will likely be a “rebounding” back to Ozarks by people who previously lived here and want to move back for quality-of-life reasons.

Mega-Trend: The Springfield metropolitan area will continue to battle a set of community challenges.

- Springfield and Greene County seem to have a relatively high level of poverty and the social problems that go with it -- high incidences of domestic violence, drug use, etc.
- Springfield and Greene County seem to have a high incidence of child abuse/neglect/poverty.
- Overall educational attainment in our area is low relative to other parts of the country, despite the many educational opportunities available in Springfield. Education will be increasingly important in the future as blue-collar jobs within many industries continue to experience a decline and service-oriented jobs continue to grow.
- The Ozarks has tremendously high levels of “bonding” social capital, a strong sense of community, and people generally trust one another. However, certain citizen and ethnic groups within our community feel alienated. As a result, many people choose not to get involved in the daily workings of political and civic life.
- Home ownership will likely decline due to higher lending standards and declining income levels. Poorer families are going to increase the demand on the rental market within the urban areas, while middle-class families will continue to move to the outer edges of the city.

Mega-Trend: The Springfield metropolitan area will participate in the “green” movement; communities will likely direct attention and resources to maintain and improve our natural environment.

- We are likely to experience a “Green Revolution.” This trend will result in greater awareness of environmental issues.
- Our region, like most, will face increasing air and water pollution issues.
- Water, air, sewer, etc., will face increasing federal and state regulations. In some cases, these regulations will result in significant compliance costs to our community.
- Regional water supply issues will be significant. Some areas within our region will face water supply shortages. Springfield has an opportunity to secure an additional water source that should provide water to our community for the next 30 years. However, regional water supply issues will become increasingly political and will likely impact the Springfield metropolitan area in various ways.
- Springfield has an aging water and sewer infrastructure that must be addressed in the near future. Regulatory compliance may force many of these upgrades, at a substantial cost to the community.
- We will experience increasing unpredictability regarding our climate.
- We will likely see a subset of citizens choosing to live in mixed-use communities due to their “green” consciousness.

Mega-Trend: The Springfield metropolitan area's economy will recover slowly; we should pay attention to attracting, retaining, and retraining a high-skilled workforce.

- We believe our area offers, and will continue to offer, a good “quality of life” relative to many metropolitan areas, characterized by the relatively low cost of living, open spaces and recreational amenities, short commute times, etc. Quality-of-life issues will be increasingly important in attracting and retaining a high-quality workforce.
- As a result of a significant number of recent housing foreclosures, our community's existing housing stock could experience significant deterioration because many lower-priced, foreclosed homes are being purchased by landlords with poor maintenance records. Lower income families/individuals will be unable to afford a house and, instead, will be forced into low-income apartments and other housing options. Our area's rental housing stock has been shrinking and deteriorating.
- Future wage/salary/employment growth will likely occur mostly in the service industries, particularly healthcare and higher education.
- We will see a continuation of the increasing education of women relative to men as jobs in the industry sector decline and jobs in the service sector increase.
- We will see increasing enrollment in community colleges.
- We will see a reduced mobility of the workforce as a result of increased telecommuting, a “boomerang” effect as people desire to live near their families, an aging citizen population, and a poor national economy.
- We will see a significant “graying” of the workforce as the Baby Boomer generation ages. Their retirement will be felt in the workforce population, with fewer workers in the following generations to re-fill the jobs vacated by the Baby Boomers. However, the Baby Boomers will work longer than previous generations, some being forced to in order to “get by” and others by choice.
- We will see a more ethnically diverse workforce population.
- We will experience a slow employment recovery from the current economic downturn, including a re-setting of the new “normal.” A lack of available cash will dictate that the economy will recover slowly.
- The workforce of the future will have difficulty absorbing the “social overhead.”
- We will likely see increased collaboration between businesses/industries.
- Our local economy will likely see increased growth within, and increased reliance on, the medical and higher education sectors.
- We will witness a significant leadership turnover within our community during the next decade.
- There will be increasing uncertainty in the economy requiring better training in job survival skills for the workforce.
- National educational attainment levels are on the decline.
- There is a strong entrepreneurial spirit in the Springfield metro area that needs to be supported in ways that improve the survivability of entrepreneurial start-ups.

Communities that reduce the high financial costs of failed businesses will better be able to succeed in uncertain economic times.

- We continue to experience a “brain drain.” Recent college graduates and young professionals are looking elsewhere for quality of life and more competitive wages.

Mega-Trend: The Springfield metropolitan area governments will suffer from increasing demand for services, slow growth in revenues, and a reduction in state and federal financial support.

- Local governments will likely see an increasing demand for government services, while simultaneously experiencing an uncertainty of resources.
- Local governments will likely be subject to an increasing number of unfunded mandates and regulations from state and federal entities.
- Local governments will likely continue to rely heavily on sales tax revenues to fund community services.
- Increasing regional collaboration between local governments will likely occur.
- Reduction in state and federal funds will likely occur.

Mega-Trend: Citizen and customer social behaviors will continue to favor mobile technologies, speed of service, and customization.

- Changes in social behavior will continue to occur at a faster pace.
- Consumers will continue to seek instant gratification.
- Communication patterns will continue to change, accommodated by advances in mobile technologies.
- People will increasingly experience and expect 24x7 lifestyles.
- Customer expectations will continue to increase, including an expectation of greater customization/personalization of products and services.
- The older population will be more active.

Mega-Trend: The Springfield metropolitan area will face increased public safety pressures.

- Springfield and Greene County will likely experience increasing levels of gang activity.
- The Springfield metropolitan area will likely experience increasing levels of cyber crimes, physical abuse, and scams.
- If public safety budgets remain stagnant, law enforcement entities will have difficulty combating these trends.
- There will be increased functional collaboration between area law enforcement entities.

Mega-Trend: The Springfield metropolitan area, like most other areas, will face increased energy costs

- Energy will cost more in the future -- perhaps significantly more. Springfield will likely experience lower energy costs in the future relative to other municipalities in the region, state, and nation.
- There will likely be increased regulation of energy in the future, likely resulting in higher energy costs.
- Alternative energy sources will continue to be researched and will evolve, becoming increasingly feasible to begin to wean our community from foreign energy sources.
- We will experience increasing uncertainty regarding our energy supply and associated regulation.
- As consumers, we will experience greater awareness of energy costs and increased abilities to monitor and adjust our energy consumption.

## Speakers to Horizon Scanning Committee

<b>Date</b>	<b>Speaker(s)</b>	<b>Topic</b>
January 5	Dr. Robin Amonker - MSU	Demographic Changes for our Region
January 12	Tim Rosenbury – Rosenbury Butler & Partners	Community Report Cards
January 19	1.Doug Neidigh, Program Dir. For Ozarks Center for sustainable Solutions, Drury University 2.Loring Bullard, Exec. Dir. Watershed committee of the Ozarks & Watershed Center 3.Barbara Lucks, City of Springfield Public Works, Materials Recovery/Education Coordinator	Air Quality, Water Quality & Water Quantity, Solid Waste Management, Land Use Management, and Tree Canopy Decline
January 26	Mary Mannix-Decker, Director of Finance, City of Springfield	Government Finance
February 2	Jim Anderson – President Chamber of Commerce	Future of Economic Development in Springfield
February 16	1.Dr. Michael Carlie – MSU 2.Sheriff Jim Arnott, Greene County 3.Interim Chief Ron Hartman, City of Springfield	Law Enforcement & Public Safety
February 23	Andy Ford, Noble/Culture Waves	Changing Consumer Behavior & Trends
March 2	Dr. Bill Rohlf – Drury University	Micro and Macro Economic Trends
March 16	1.Roddy Rogers, City Utilities 2.Steve Meyer, Asst. Dir. Of Public Works, City of Springfield	Water Supply, Storm Water, & Waste Water
March 23	1.John Twitty, General Manager, City Utilities 2.Jim Gardner, Oakridge Consulting	Future of Energy
March 30	Jack Stack, SRC	Future of Business