

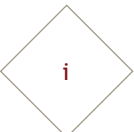
# ECONOMIC COLLABORATIVE OF NORTHERN ARIZONA



## FORGING THE FUTURE: AN ECONOMIC DEVELOPMENT ROADMAP FOR NORTHERN ARIZONA

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## SECTION 1: INTRODUCTION

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The Northern Arizona region has much to be proud of and treasure. Blessed with its location situated in the midst of majestic natural beauty and its vibrancy as a region that is home to a highly educated population, a closely-woven culture of caring and neighborliness, a respected university and community college, several major employers engaged in cutting edge research and manufacturing, a bustling small business community, a pleasing arts and culture scene and countless other equally important assets and attributes, Northern Arizona is well positioned to become an even more desirable region where people and business want to establish their lives and livelihoods for generations to come.

Today, Northern Arizona is approaching a critical inflection point. Strong viewpoints and forces within some communities both support continued population and economic growth as well as oppose it. In examining population trends, some areas of the region generally are experiencing or are projected for a net decline in people - this, despite the presence of two high performing educational institutions, major employers who provide high quality and high paying jobs and a natural and built environment that is a mecca for healthy living and outdoor experiences and recreation.

This economic development strategy is based on a very broad and comprehensive, data-driven analysis of the region's:

- ◆ Current economic status
- ◆ Current competitive standing vis-à-vis three comparable competitor markets
- ◆ Current and projected labor force
- ◆ Current and projected housing outlook
- ◆ Targeted sector analysis
- ◆ Stakeholder perspectives and SWOT analysis

We would like to acknowledge and thank ECoNA and its many board members, investors, partners and stakeholders for their participation and engagement in the strategic planning process and look forward to their continued commitment to build an even more vibrant region for all.



## SECTION 2: AN ECONOMIC SNAPSHOT OF NORTHERN ARIZONA

Historic population growth has varied across the ECoNA region. Among ECoNA communities, Flagstaff, Williams, and Camp Verde have experienced growth over the last 12 years while Sedona and Winslow have experienced a contraction in population.

POPULATION CHANGE 2010 - 2022				
Place	2010	2022	2010-2022 Change	CAGR
Camp Verde	10,900	12,430	1,530	1.1%
Flagstaff	66,017	78,664	12,647	1.5%
Sedona	10,004	9,834	-170	-0.1%
Williams	3,028	3,538	510	1.3%
Winslow	9,648	8,774	-874	-0.8%
Coconino County	134,664	149,647	14,983	0.9%

CAGR - Compounded Annual Growth Rate  
Source: Arizona Office of Economic Opportunity

Historical and projected population growth portend the most substantial competitive disadvantage for the ECoNA region. Coconino County grew by just 10,700 residents from 2010 to 2020. Future growth prospects are similar. The ECoNA region is expected to experience only modest growth in the near term, then transition from flat to declining population growth over the long term, with a maximum population count of approximately 160,000 residents (by 2045).

The City of Flagstaff is expected to account for nearly 90% of all of Coconino County's growth. Both Sedona and Camp Verde are forecasted to add nearly 1,100 residents over the next 20 years. Municipalities such as Williams and Winslow are expected to experience declines in population.

## 2021 - 2040 POPULATION FORECAST

	2021	2025	2030	2035	2040	2021-204 Change	Change	% of County's Growth
<b>Coconino County</b>	<b>149,630</b>	<b>154,377</b>	<b>157,773</b>	<b>160,244</b>	<b>161,771</b>	<b>12,141</b>	<b>8.1%</b>	
Flagstaff	77,801	81,447	84,517	86,927	88,691	10,890	14.0%	89.7%
Fredonia	1,323	1,326	1,315	1,302	1,289	-35	-2.6%	-0.3%
Page	7,804	7,987	8,088	8,144	8,158	354	4.5%	2.9%
Sedona*	2,969	3,055	3,126	3,197	3,260	290	9.8%	2.4%
Tusayan	592	593	588	582	576	-16	-2.8%	-0.1%
Williams	3,346	3,383	3,378	3,360	3,327	-19	-0.6%	-0.2%
Unincorporated County	55,794	56,586	56,762	56,731	56,471	677	1.2%	5.6%
Camp Verde	11,281	11,435	11,612	11,971	12,334	1,053	9.3%	
Sedona* (Yavapai)	7,460	7,533	7,651	7,924	8,251	792	10.6%	
Winslow	9,668	9,493	9,290	9,094	8,889	-779	-8.1%	

Source: Arizona Office of Economic Opportunity

Age statistics for cities and towns in the ECoNA region also vary substantially. Flagstaff has the highest percentage of residents 15-19 years old and the lowest median age at 25.8 years. Apart from Sedona, many of the ECoNA communities have a significant presence of children under the age of 15. The City of Winslow has the highest percentage of young workers (age 25-34) within the ECoNA region, a critical factor in retaining existing and attracting new employers. The older population in the region's municipalities appears balanced. Camp Verde is home to a higher percentage of residents aged 65 or older.

## POPULATION BY AGE

Place	Camp Verde		Flagstaff		Sedona		Williams		Winslow		Coconino County	
		%		%		%		%		%		%
Total	11,942		76,228		9,723		3,235		8,961		144,942	
Under 5 years	536	4.5%	3,602	4.7%	53	0.5%	293	9.1%	495	5.5%	7,401	5.1%
5 to 9 years	650	5.4%	3,651	4.8%	308	3.2%	162	5.0%	456	5.1%	7,407	5.1%
10 to 14 years	793	6.6%	4,065	5.3%	445	4.6%	229	7.1%	793	8.8%	9,564	6.6%
15 to 19 years	872	7.3%	12,710	16.7%	360	3.7%	210	6.5%	599	6.7%	16,928	11.7%
20 to 24 years	573	4.8%	13,102	17.2%	153	1.6%	223	6.9%	859	9.6%	17,444	12.0%
25 to 29 years	884	7.4%	6,587	8.6%	289	3.0%	181	5.6%	730	8.1%	10,977	7.6%
30 to 34 years	476	4.0%	5,205	6.8%	451	4.6%	177	5.5%	1,036	11.6%	9,067	6.3%
35 to 39 years	863	7.2%	4,049	5.3%	628	6.5%	160	4.9%	828	9.2%	8,154	5.6%
40 to 44 years	901	7.5%	4,129	5.4%	316	3.3%	140	4.3%	610	6.8%	7,888	5.4%
45 to 49 years	567	4.7%	3,338	4.4%	471	4.8%	117	3.6%	659	7.4%	7,374	5.1%
50 to 54 years	559	4.7%	2,862	3.8%	685	7.0%	240	7.4%	425	4.7%	7,425	5.1%
55 to 59 years	664	5.6%	3,160	4.1%	1,147	11.8%	262	8.1%	452	5.0%	8,362	5.8%
60 to 64 years	941	7.9%	3,299	4.3%	889	9.1%	260	8.0%	374	4.2%	8,323	5.7%
65 to 69 years	668	5.6%	2,700	3.5%	1,371	14.1%	194	6.0%	231	2.6%	7,266	5.0%
70 to 74 years	627	5.3%	1,757	2.3%	937	9.6%	206	6.4%	178	2.0%	4,998	3.4%
75 to 79 years	756	6.3%	861	1.1%	649	6.7%	89	2.8%	103	1.1%	3,107	2.1%
80 to 84 years	427	3.6%	738	1.0%	278	2.9%	70	2.2%	76	0.8%	2,009	1.4%
85 years and over	185	1.5%	413	0.5%	293	3.0%	22	0.7%	57	0.6%	1,248	0.9%
Median Age	41.2		25.8		58.5		38.7		33.3		31.5	

Source: ACS 2021 5-year estimate



The ECoNA region’s cities and towns contain a diverse mix of residents. Winslow’s largest population is American Indian and the city also has the highest percentage of African Americans. Flagstaff has the largest Hispanic population in the region.

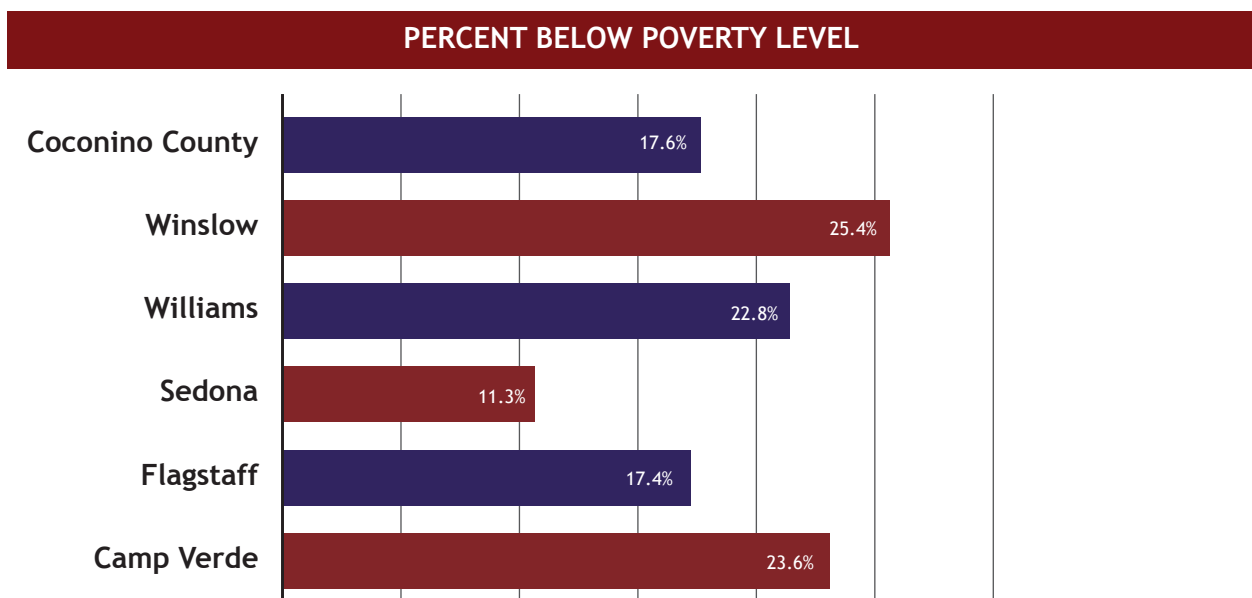
POPULATION BY RACE						
	Camp Verde		Flagstaff		Sedona	
		%		%		%
Total	11,942		76,228		9,723	
White alone	9,727	81.5%	55,341	72.6%	7,622	78.4%
Black or African American alone	53	0.4%	1,175	1.5%	43	0.4%
American Indian and Alaska Native alone	638	5.3%	6,983	9.2%	14	0.1%
Asian alone	90	0.8%	1,991	2.6%	269	2.8%
Native Hawaiian and Other Pacific Islander	55	0.5%	156	0.2%	0	0.0%
Some other race alone	983	8.2%	4,071	5.3%	1,582	16.3%
Two or more races	396	3.3%	6,511	8.5%	193	2.0%
	Williams		Winslow		Coconino County	
		%		%		%
Total:	3,235		8,961		144,942	
White alone	2,156	66.6%	2,711	30.3%	87,259	60.2%
Black or African American alone	116	3.6%	436	4.9%	2,035	1.4%
American Indian and Alaska Native alone	118	3.6%	3,665	40.9%	37,533	25.9%
Asian alone	40	1.2%	12	0.1%	2,554	1.8%
Native Hawaiian and Other Pacific Islander	0	0.0%	0	0.0%	230	0.2%
Some other race alone	665	20.6%	1,355	15.1%	6,570	4.5%
Two or more races	140	4.3%	782	8.7%	8,761	6.0%

Source: ACS 2021 5-year estimate

The City of Flagstaff and City of Sedona have significantly higher median income compared to the surrounding ECoNA cities. The City of Flagstaff's median income is nearly 46% higher than that of the City of Winslow and 31% higher than Camp Verde. Poverty in most of the ECoNA region exceeds the statewide average substantially. Poverty rates across the ECoNA region range from 11.3% (Sedona) to 25.4% (Winslow). This compares to the Arizona statewide average of 13.5%.

HOUSEHOLD INCOME														
Place	Camp Verde		Flagstaff		Sedona		Williams		Winslow		Coconino County	Arizona Estimate		
		%		%		%		%		%	%	%		
Occupied Units	4,085		26,450		4,902		1,302		2,484	2484	51,037	2,683,557		
Less than \$10,000	376	9.2%	1,852	7.0%	289	5.9%	182	14.0%	323	13.0%	3,828	7.5%	147,596	5.5%
\$10,000 to \$14,999	86	2.1%	1,323	5.0%	211	4.3%	96	7.4%	109	4.4%	2,501	4.9%	91,241	3.4%
\$15,000 to \$19,999	515	12.6%	2,222	8.4%	250	5.1%	124	9.5%	308	12.4%	4,389	8.6%	206,634	7.7%
\$20,000 to \$24,999	498	12.2%	2,142	8.1%	480	9.8%	122	9.4%	263	10.6%	4,134	8.1%	228,102	8.5%
\$25,000 to \$34,999	707	17.3%	3,333	12.6%	725	14.8%	111	8.5%	400	16.1%	5,665	11.1%	338,128	12.6%
\$35,000 to \$49,999	719	17.6%	5,184	19.6%	941	19.2%	303	23.3%	445	17.9%	9,952	19.5%	488,407	18.2%
\$50,000 to \$74,999	380	9.3%	2,910	11.0%	750	15.3%	154	11.8%	229	9.2%	6,073	11.9%	362,280	13.5%
\$75,000 to \$99,999	494	12.1%	3,968	15.0%	515	10.5%	99	7.6%	298	12.0%	7,502	14.7%	437,420	16.3%
\$100,000 to \$149,999	78	1.9%	1,799	6.8%	279	5.7%	66	5.1%	107	4.3%	3,573	7.0%	187,849	7.0%
\$150,000 or more	237	5.8%	1,693	6.4%	461	9.4%	43	3.3%	5	0.2%	3,368	6.6%	198,583	7.4%
Average	\$66,449		\$82,348		\$90,058		\$60,023		\$53,842		\$84,392		\$89,693	
Median	\$46,563		\$61,026		\$58,901		\$52,206		\$41,926		\$61,888		\$65,913	
Homeowner Median	\$50,082		\$97,110		\$71,848		\$62,832		\$65,508		\$77,848		\$79,873	
Renter Median	\$32,661		\$44,279		\$45,547		\$22,827		\$35,710		\$45,630		\$46,290	

Source: ACS 2021 5-year estimate



Source: ACS 2021 5-year estimates

In terms of employment, Government is the largest employer in the region, accounting for 28% of all jobs. Leisure & Hospitality comprise the next largest percentage of jobs with 23%, followed by Trade, Transportation & Utilities (15%), Education & Health Services (13%), Professional & Business (6%), and Manufacturing (5%).

### Coconino County Employment

The Government sector supplies the highest percentage of jobs within Coconino County. This sector includes Federal, State, County and Local government jobs, which encompass a broad range of industries and occupations. Some of those include:

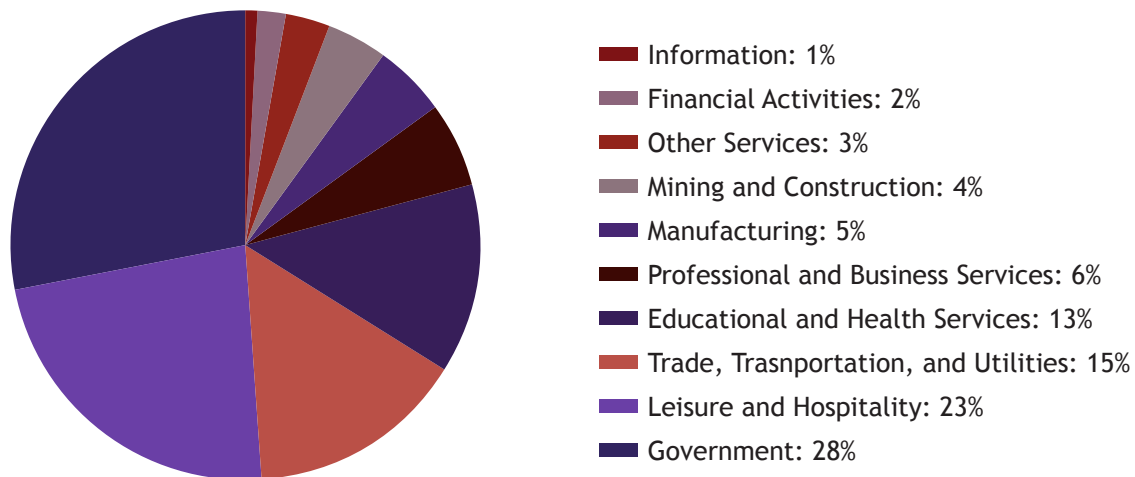
### Coconino County Employment by Industry Sector

By separating jobs by industry sector as opposed to aggregating jobs by who the employer may be (such as government), Coconino County shows a much more diversified base of industries.

- ◆ Professional & Business Services
- ◆ Education (primary, secondary, and post-secondary)
- ◆ Utilities (water supply & irrigation systems)
- ◆ Construction
- ◆ Libraries
- ◆ Waste Management
- ◆ Fitness & Recreational Centers
- ◆ Executive, Legislative, and General Government
- ◆ Public Finance
- ◆ Government Support Services
- ◆ Justice, Public Order, & Safety Activities
- ◆ Legal Counsel & Prosecution
- ◆ National Security & International Affairs
- ◆ Police & Fire Protection
- ◆ Postal Service
- ◆ Health Care & Social Assistance

Using this approach, it is apparent that the Accommodations sector constitutes the largest source of jobs, followed by health care, education, retail trade, and manufacturing.

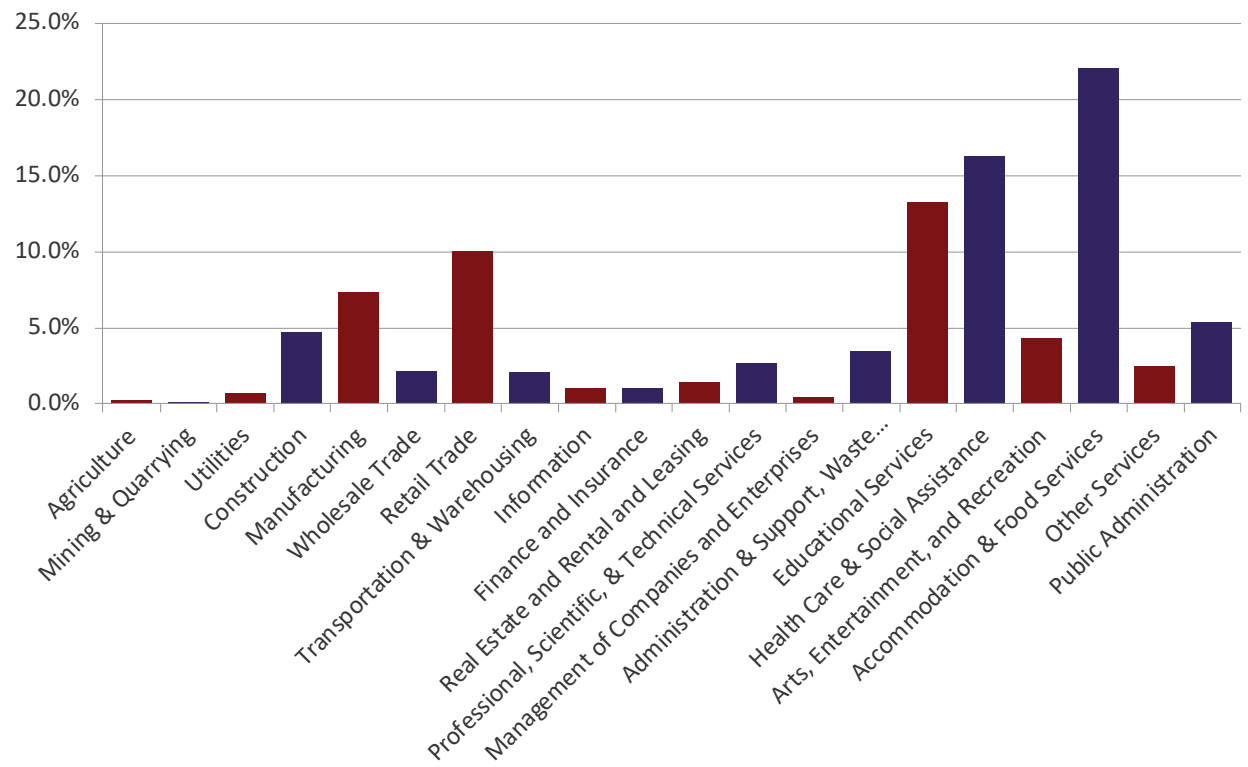
### COCONINO COUNTY EMPLOYMENT BY SECTOR



Source: U.S. Bureau of Labor Statistics; AOEO

Comparing the current employment composition of the local communities, Coconino County, and the State of Arizona offers some valuable insights. For each area, the economic base of the region and Arizona offers an illustration as to the potential for growth as the broader economy continues to grow and mature.

### COCONINO COUNTY EMPLOYMENT BY INDUSTRY - 2020



Source: U.S. Bureau of Labor Statistics; AOEO

In terms of the distribution of employment based on U.S. Census figures, the City of Flagstaff and Coconino County have a higher share of employment in manufacturing. Compared to statewide averages, most of the ECoNA communities contain a higher share of jobs in sectors such as educational services, health care & social assistance, accommodation & food services, and public administration. Communities such as Williams and Camp Verde have a higher concentration of construction jobs. Camp Verde also has a higher share of transportation related jobs. On the other hand, the region has comparatively smaller shares in wholesale trade, transportation & warehousing, information, finance and insurance, professional services, management, administrative and support services relative to the overall size of its economy.

## EMPLOYMENT BY INDUSTRY

	Camp Verde	Flagstaff	Page	Sedona	Williams	Winslow	Coconino County	Arizona
<b>Total Jobs</b>	<b>3072</b>	<b>34,738</b>	<b>3,523</b>	<b>5,046</b>	<b>1382</b>	<b>2783</b>	<b>53,519</b>	<b>2,678,745</b>
Agriculture, Forestry, Fishing & Hunting	0.7%	0.2%	0.0%	0.0%	0.7%	0.7%	0.2%	0.9%
Mining, Quarrying, Oil & Gas Extraction	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.5%
Utilities	0.6%	0.5%	2.8%	0.5%	1.4%	0.5%	0.6%	0.8%
Construction	10.0%	4.4%	2.1%	4.3%	7.3%	1.9%	4.7%	6.2%
Manufacturing	3.5%	10.1%	0.7%	1.9%	4.3%	0.4%	7.3%	6.6%
Wholesale Trade	0.4%	1.9%	2.3%	1.3%	0.2%	0.4%	2.1%	3.6%
Retail Trade	9.4%	10.2%	8.5%	16.4%	14.8%	13.5%	9.9%	11.2%
Transportation and Warehousing	4.8%	0.8%	0.8%	1.7%	0.4%	0.9%	2.0%	3.8%
Information	0.4%	1.2%	0.9%	1.6%	0.9%	0.4%	1.0%	1.8%
Finance and Insurance	1.3%	1.3%	0.6%	1.4%	0.5%	1.3%	1.0%	6.1%
Real Estate and Rental and Leasing	0.8%	1.2%	2.2%	3.5%	0.4%	0.9%	1.4%	2.0%
Professional, Scientific, & Tech Services	1.4%	2.9%	0.9%	4.2%	3.5%	0.4%	2.6%	5.7%
Management of Companies & Enterprises	0.0%	0.4%	0.6%	0.7%	0.0%	0.0%	0.4%	1.2%
Admin & Support, Waste Mgt & Rem.	3.0%	3.1%	2.2%	5.2%	0.3%	2.6%	3.4%	8.8%
Educational Services	8.5%	16.8%	10.4%	3.9%	8.3%	13.0%	13.3%	8.3%
Health Care and Social Assistance	14.8%	19.7%	14.9%	7.0%	3.8%	36.5%	16.2%	13.9%
Arts, Entertainment, and Recreation	16.9%	2.6%	3.3%	2.0%	4.3%	0.9%	4.2%	2.0%
Accommodation and Food Services	9.9%	16.8%	23.9%	32.9%	41.3%	19.4%	22.0%	9.4%
Other Services	1.3%	2.5%	5.4%	6.4%	0.4%	1.8%	2.4%	2.7%
Public Administration	12.4%	3.3%	17.6%	5.2%	7.1%	4.3%	5.3%	4.6%

Source: U.S. Census Bureau. 2020. OnTheMap Application. Longitudinal-Employer Household Dynamics Program

## SECTION 3: COMPETITOR MARKET ANALYSIS

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The Competitor Market Analysis informs ECoNA and the Northern Arizona region on a broad range of economic indicators that directly impact business expansion and location decisions. The comparisons provided in this analysis help to identify comparative strengths and weaknesses that the region possesses relative to other municipalities and larger economic regions. ECoNA has wisely chosen to request a comparison of their economic characteristics to areas outside of Arizona. This decision recognizes the fact that many companies consider several regions throughout the country prior to narrowing in on a specific location for their expansion or new facility locations.

The data that has been gathered helps to illustrate how the ECoNA region's municipalities compare to selected municipalities located in other states with which Arizona competes for business expansions and new locations. Data is provided for the Town of Camp Verde and the cities of Flagstaff, Page, Sedona, Williams, and Winslow as well as Coconino County. The cities of Fort Collins, Colorado; Bozeman, Montana, and St. George, Utah and their larger county regions (Larimer County, Colorado; Gallatin County, Montana, and Washington County, Utah) were selected for comparison through collaborative discussions with ECoNA.

For additional reference, each of the indicators that are provided for local municipalities are provided for the broader economic region of Coconino County, and the counties of competitor markets identified previously. This information helps to inform ECoNA of challenges or strengths that Coconino County possesses compared to these other regions and can aid the region in its participation with larger economic development initiatives occurring at the regional and state level.

This data also helps to inform the targeted economic sector analysis. With regard to identifying targeted economic sectors that will provide a significant opportunity to grow and diversify Northern Arizona's economy, this information is fundamentally important to understanding the region's competitive position. The regional (county) comparative data points to competitive advantages and disadvantages in the Northern Arizona market. Our approach in selecting and analyzing targeted economic sectors to grow Northern Arizona's economy focuses on the opportunities that can best capitalize on the competitive advantages of the ECoNA region vis-à-vis those of the comparative metro markets.

The competitor market analysis included a deep dive into the most important factors that are primary drivers for the economic health of local and regional economies as well as critical in site selection criteria. More specifically, the following factors have been analyzed, all of which have significant weight in business expansions and new facility location decision-making.

### **1. Demographic Characteristics**

Data from the U.S. Census American Community Survey as well as various state agencies reporting total population, age ranges, the distribution of race/ethnicity, household size, renters and owners, and income.

### **2. Workforce / Talent**

Attributes of the local workforce have been outlined including several aspects of educational attainment, labor force growth and participation, unemployment, occupations, occupational wages, and industries that residents work in.

### 3. Local Economy

Characteristics of employment located within each area are detailed including total number of jobs, the types and amount of employment among various industry categories, and worker characteristics. The comparison of this data to the potential of the local workforce is included for potential targeted industry considerations.

### 4. Geography & Commercial Real Estate

Descriptions of the municipalities are provided in terms of access to transportation infrastructure, proximity to larger markets, current conditions of the office and industrial markets (at the MSA level) and construction costs relative to the U.S. average.

### 5. Livability

Various indicators related to local quality of life are presented which consider housing affordability, crime, commuting patterns, geographic mobility, and the quality of local secondary education.

With this fact-based approach to economic conditions, ECoNA and regional policy-makers can make informed decisions and highlight areas of competitive advantage to existing businesses and prospective new employers. In addition, this data identifies comparative weaknesses that the region can and should endeavor to address by formulating targeted initiatives and deploying resources to either mitigate or make improvements in both the short term and long term.


This report can also serve as a template for further research by ECoNA. Additional cities, towns, or metro regions can be identified and be made the subject of future competitive analysis utilizing the indicators in this report. Wherever possible, data was gathered from publicly available sources and referenced under each display of data.

Northern Arizona as a region has favorable characteristics to other counties that have been analyzed in terms of its young population, diversity, healthy but competitive incomes; and a good representation of industries and skilled occupations among its workforce. The median income for Coconino County was comparable to Washington County, Utah, which is a key metric that is significantly lower than several of the counties selected for comparison. The region also has desirable quality of life aspects including low crime in some of its communities, access to higher education, a beautiful environment, and ample recreational opportunities.

The area's workforce is well represented across economic sectors and has a good proportion of skilled labor compared to out-of-state competitors. Wages are also considered competitive both locally and compared to other regions. Labor force and unemployment statistics suggest that the area has recovered but needs more employment opportunities to reach full employment and to improve the labor force participation rate.

Educational attainment data showed mixed results. The region lagged places such as Larimer County, Colorado and Gallatin County, Montana in terms of post-secondary degrees but far outpaced Washington County, Utah. Full access to a four-year institution is a significant asset. The region posted the highest percentage of adults enrolled in college or graduate school.

Lack of economic diversity in the ECoNA communities outside of Flagstaff and the muted historical growth of jobs are a challenge for the ECoNA region's economic development. Solutions to expand the population base of the area and provide attainable housing will be critical to the success of future economic development efforts. Secondly, a greater focus on attracting different types of industries that can take advantage of the area's resident workforce (both college and non-college educated), will need to be a key focus of the economic development strategy moving forward.



The ECoNA region has both strengths and weaknesses in terms of its location, proximity to transportation networks, and distance from major markets. The presence of highways - both I-17 and I-40 - provide excellent interstate roadway networks connecting several ECoNA municipalities to major markets such as Phoenix, Las Vegas, Los Angeles, and Albuquerque. The BNSF rail line is also a major asset for areas such as Bellemont, Flagstaff, Williams, and Winslow to create shipping connections to a significant portion of the United States to the east.

The region is somewhat constrained in its geographic location in terms of distance to major markets. With the natural barriers of the Coconino and Tonto national forests as well as Native American community lands, the region is on a virtual island. Flagstaff is approximately a two-hour drive from Phoenix and just under four hours from Las Vegas. Camp Verde is just one hour from parts of North Phoenix and also less than an hour drive to other large regional municipalities such as Cottonwood, Prescott, and Prescott Valley. This allows Camp Verde to draw on a larger pool of workers. Communities such as Williams and Winslow are the most geographically isolated. In addition, the Flagstaff Pulliam Airport offers limited destinations to Phoenix, Arizona and Dallas, Texas.

The Flagstaff MSA contains no excess vacancies in either office or industrial space and indicates there is likely pent-up demand for additional space, with healthy rent growth in both sectors over the past 12 months. Lack of move-in ready building space can hinder economic development opportunities. Lease rates are considered competitive compared to the other metros. In addition, there is currently no office space under construction and 82,000 square feet of industrial space under construction (72,000 square feet is already pre-leased to a single user). Compared to the other metros, Flagstaff has the smallest office market footprint compared to the competitor markets analyzed. Flagstaff has a larger industrial market than Bozeman, Montana but much smaller than St. George, Utah or Fort Collins, Colorado. Overall, the competitive markets have substantially more commercial space available compared to Northern Arizona.

The ECoNA region has mixed results in terms of livability, especially comparing city-level data. Highlights for communities such as Page, Winslow, and Flagstaff include relatively low commute times. Camp Verde, Sedona, and Flagstaff report low crime (it is especially low in the City of Flagstaff). Flagstaff also shows a good percentage of in-migration. Housing affordability is a challenge in most of the communities. Sedona reports the highest median home value at \$881,900 followed by Flagstaff at \$609,500. The only other municipality with home values below \$400,000 is Camp Verde (\$395,900). Affordability is certainly an asset in Winslow, which reports a median home value of \$165,600.

Overall, the Northern Arizona region has strategic advantages such as a young population; a diverse mix of residents; healthy but competitive incomes; and a good representation of industries and skilled occupations among its workforce. The region also has desirable quality of life aspects including low crime in some of its communities, access to higher education, a beautiful environment, and ample recreational opportunities.

Historical and projected population growth appear to be the most substantial competitive disadvantage for the ECoNA region and represent a hindrance to attracting new industry. In 2010, Coconino County reported a similar population to Washington County, Utah and nearly 50% higher population count than Gallatin County, Montana. By 2020, the St. George, Utah region grew by over 42,000 residents while Coconino County grew by 10,700 residents. The Bozeman, Montana region grew by nearly 30,000 residents over the same time period and the larger Fort Collins, Colorado region added nearly 60,000 residents.



Future growth prospects are similar. The ECoNA region is expected to experience only modest population growth in the near term, then transitioning to flat to declining growth long term, with a maximum population count of approximately 160,000 residents (by 2045). In contrast, both the Fort Collins region and St. George region are expected to continue to add well over 100,000 residents over the same time period. It is also projected that the Bozeman region will surpass Coconino County in population by 2035.

The following table summarizes the comparative advantages and disadvantages for the ECoNA region relative to the selected out-of-state areas. Most of the region’s strengths are found in its demographics, workforce talent, and quality of life. While these factors are important, there are other regions that also possess these qualities. Factoring in a more diversified economy, higher educational attainment, higher quality K-12 education and, most especially, historical and projected population growth allow these regions a decided advantage in economic development.

SUMMARY OF ECONOMIC CONDITIONS		
	ECoNA Region / Coconino County	Competitive Advantage (+) Disadvantage (-)
<b>Demographics</b>		
Median Age (years)	31.5	+
Home Ownership (%)	59.9%	neutral
Diversity (Non-White %)	39.8%	+
Median Income	\$61,888	-
Growth Prospects (Avg. Ann. % through 2035)	0.4%	-
<b>Workforce/Talent</b>		
Educational Attainment (Assoc. or higher)	46.9%	-
College/Grad School Enrollment (age 18-24)	69.6%	+
Access to Higher Education	University	+
Industry Mix	Diverse	neutral
Occupational Mix	Diverse	neutral
Occupational Wages	Competitive	+
Labor Force Growth	0.6%	-
Labor Force Participation	64.2%	-
Unemployment	4.4%	-
<b>Local Economy</b>		
Industry Mix of Jobs	Diverse/Tourism Heavy	neutral
Worker Earnings (% \$40,000 or More)	40.7%	-
Worker Education (% Bach. or Higher)	18.9%	-
Historical Growth (2009-2019)	0.6%	-
Growth Prospects (Avg. Ann. %)	1.7%	-

## SUMMARY OF ECONOMIC CONDITIONS

	ECoNA Region / Coconino County	Competitive Advantage (+) Disadvantage (-)
<b>Geography &amp; Real Estate</b>		
Location/Access to Markets	Hwys/Rail	+
Availability of Sites/Space	Limited	-
Office Space/Vacant Space	2,095,530 SF / 46,371 SF	-
Office Space Under Construction (SF)	0 SF	-
Industrial Space/Vacant Space (SF)	4,343,807 SF / 40,847 SF	-
Industrial Space Under Construction (SF)	82,000 SF (87.8% preleased)	-
Vacancy Rate (Office/Industrial)	2.2% / 0.3%	-
Lease Rates (Office/Industrial)	\$26.00 / \$12.30	neutral
Construction Cost Index (U.S. = 100)	90.3	neutral
<b>Livability</b>		
Commuting (% 30 or More Minutes)	17.5%	neutral
Crime Rate per 1,000 Residents (Violent/ Property)	0.60 - 11.94 / 4.63 - 38.5	mixed
Natural Environment	Scenic	+
Recreation Opportunities	High	+
% Housing Stock Affordable to Med. Income	15.6%	neutral
Graduation Rate	83% - 100%	mixed
College Readiness Index (U.S. Median = 20.17)	8.9 - 100	mixed
Population Turnover (% Moved in Last Year)	33.2%	+

## SECTION 4: LABOR SHED ANALYSIS

Economic and labor force statistics were gathered on each of the ECoNA communities and the Coconino County region as a whole for purposes of this labor shed analysis as well as the analyses on competitor markets, targeted sectors and housing. Detailed data for resident skills and employment as well as the presence of jobs within each community can be found in those reports.

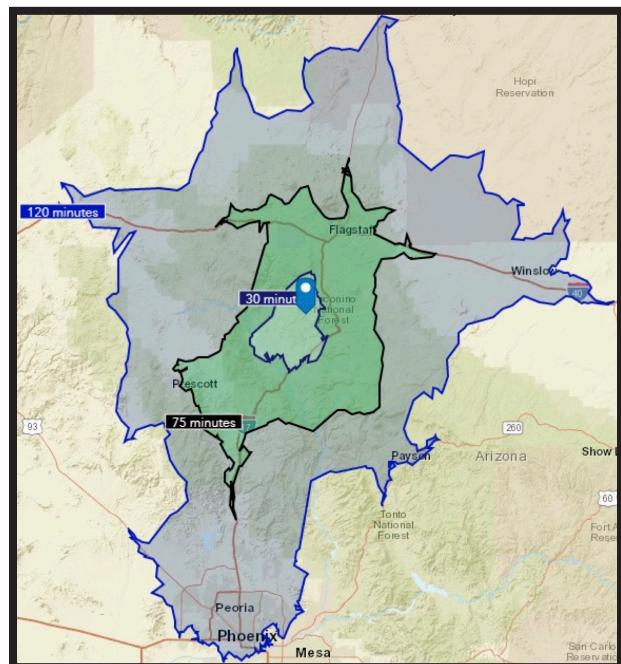
This additional analysis provides a snapshot profile of the availability of labor and skills for each community in the ECoNA region. These profiles are designed to be a tool to share with both existing employers as well as prospective new employers considering ECoNA communities for a business expansion or new facility location.

It is well known in Northern Arizona that substantial portions of the workforce regularly travel long distances to and from their place of work. This analysis provides objective data that substantiates those claims through U.S. Census survey results. Indeed, there are many individuals working in ECoNA communities that commute one to two hours each way to work. Some travel even greater distances.

With U.S. Census data reporting the place of residence for ECoNA community employees, drive-time models were utilized within GIS software to illustrate each community's labor shed - the geographic area containing the majority of each area's workers. Data is presented in terms of driving distance to the community and includes three regions in order of expanding size. The largest area is considered each community's primary labor shed. In every case, there are also additional workers living beyond the primary labor shed.

Labor force statistics are provided for each community's labor shed areas and include the number of employed people, industries workers are currently employed in, occupations, educational attainment, labor force participation, and employment/unemployment rates by age. These profiles can be found in the separate report provided to ECoNA in June 2023.

Overall, workforce commuter data confirms that each ECoNA community has access to a potential workforce many times greater than the existing workforce residing in each community. Additionally, the diversity of skills, knowledge, and training is far greater than the statistics of each community alone. This should allow ECoNA communities to communicate with existing employers as well as prospective new firms as to their workforce availability and skillsets. It also removes potential barriers to growing the economy by attracting firms in targeted sectors that may not currently exist within a given community within the ECoNA region.



## SECTION 5: REGIONAL HOUSING ANALYSIS

“Affordable” housing is often associated with housing for the lowest income households. “Workforce” or “attainable” housing is often associated with the demand from critical service providers and other service workers. In the context of this analysis, the term “affordable” will apply to all households that are burdened by housing costs or those that can’t find housing due to its cost relative to household income. Affordable housing refers to a continuum of housing demand that affects persons from the lowest income levels to those earning above the area median income. A healthy economy and housing market must address all these demand sectors.

A housing “gap” is the difference between the demand for housing units available at different income levels and the supply of those units. The “gap” affects both homeowners as well as renters. However, homeowners have more options to reduce their housing costs; renters have limited options other than to find more affordable housing farther from their place of employment or to double up with roommates to share rent. The effort to address affordable housing should approach both ownership units (which help bring stability to neighborhoods) as well as providing rental units for all income levels.

### *Housing Gap Assessment Findings*

- ◆ The ECoNA housing inventory varies widely from community to community. Overall, the percentage of single family homes in the ECoNA region at 52.5% is well below the statewide average of 64.1%. However, communities such as Sedona, Williams, and Winslow have a significantly higher percentage of single family homes. The inventory also differs greatly for manufactured homes and apartments. Approximately 8.6% of all housing units in the region are manufactured homes compared to the Arizona average of 9.9%. However, manufactured homes comprise over 33% of units in Camp Verde.
- ◆ The inventory of traditional apartment units in the region is very low. Apartment inventory is nearly non-existent in places such as Williams (3.3%) and Camp Verde (3.6%). Both Sedona and Winslow are also well below the statewide average. Only Flagstaff has a significant percentage of apartment units at 29.5% of the city’s housing stock. Lack of apartments restricts the ability of low and moderate income households to find housing in the region.
- ◆ Approximately 8.6% of all housing units in the ECoNA region are manufactured homes compared to the statewide average of 9.9%. Manufactured homes comprise a high percentage of units in Camp Verde. Additional manufactured housing inventory is also a reliable source of affordable housing. According to the U.S. Census, 1,102 of 3,856 occupied mobile homes in the ECoNA region (28.6%) were built before 1979. It is likely that many of these units may pose health and safety hazards for residents if built before June 1976 when HUD established minimum standards for construction.
- ◆ From 2013 to 2022, the average price of a single family home has increased by between 152% to 294% across the ECoNA region. The price of single family housing in most communities rose by an annual average of between 9.7% and 11.6% since 2013. Average prices vary widely. Average prices in 2022 ranged from \$188,566 in Winslow up to nearly \$1.3 million in Sedona. Currently, only 15.6% of homes sold in the region are affordable to families earning the median income. Prices for condominiums, townhomes, and manufactured homes have experienced similarly dramatic increases.

AVERAGE SALES PRICE SINGLE SINGLE FAMILY HOMES ECoNA REGION					
Year	Camp Verde	Flagstaff	Sedona	Williams	Winslow
2013	\$169,568	\$316,398	\$429,368	\$130,804	\$69,293
2014	\$229,696	\$342,358	\$520,790	\$133,950	\$84,968
2015	\$206,593	\$350,905	\$493,693	\$161,327	\$77,990
2016	\$197,661	\$379,195	\$562,440	\$176,832	\$91,712
2017	\$231,377	\$388,192	\$534,976	\$185,480	\$92,021
2018	\$261,497	\$442,360	\$634,081	\$200,841	\$110,647
2019	\$286,320	\$457,956	\$626,055	\$255,483	\$105,019
2020	\$314,906	\$572,974	\$806,866	\$262,558	\$128,778
2021	\$409,040	\$683,881	\$1,039,224	\$398,390	\$148,518
2022	\$446,152	\$797,920	\$1,288,902	\$515,344	\$188,566
Price Chg 2018 - 2022	71%	80%	103%	157%	70%

Source: Coconino County Assessor; Navajo County Assessor; Yavapai County Assessor

- ◆ For some communities in the ECoNA region, rents have increased dramatically over the last several years. Communities such as Williams and Winslow have shown more modest rent growth whereas Sedona, Flagstaff, and Camp Verde have experienced 30%-50% rent growth over the last 5 years, well above the rate of inflation. Household income growth has been only a fraction of the growth experienced in rent growth.

## ECoNA REGION APARTMENT INVENTORY & TRENDS

Community	Properties	Units	Average Rent			Vacancy	Vacant Units
			2018	2023	% Chg		
Camp Verde	4	135	\$910	\$1,361	49.6%	4.1%	6
Flagstaff	118	6,438	\$1,340	\$1,839	37.2%	4.5%	290
Sedona	19	396	\$1,211	\$1,578	30.3%	2.5%	10
Williams	12	113	\$851	\$922	8.3%	6.6%	7
Winslow	12	239	\$855	\$944	10.4%	12.2%	29

Source: ALN; Apartments.com; Property websites

- ◆ The ECoNA region is forecasted by the Arizona Office of Economic Opportunity to grow from its 2021 population of 112,526 to 124,751 over the next 20 years. Over 89% of that growth is expected to occur in Flagstaff, followed by increases in Camp Verde and Sedona. Williams and Winslow are projected to lose population over that time period.
- ◆ Poverty in the ECoNA region is above the statewide average. Only Sedona reports a lower percentage of households in poverty compared to the State of Arizona as a whole. Among the ECoNA communities, Winslow reports the highest percentage in poverty at 25.4% of households, followed by Camp Verde at 23.6% and Williams at 22.8%.
- ◆ In 2019, the percentage of households that would qualify for low-income housing exceeded the statewide average in each of the ECoNA communities. The percentage of households that would qualify for workforce housing and other government housing assistance programs exceeded the statewide average in two of the five communities. The City of Williams (41.2%) and Town of Camp Verde (34.8%) reported the highest percentage of households that would qualify for low income housing options, followed by Flagstaff (27.5%) and Winslow (26.8%). In total, there are over 20,650 households in the region that could potentially benefit from rental or ownership assistance.
- ◆ Employment in the ECoNA region is expected to continue to grow over the next ten years. Employment is forecasted to increase from 71,500 jobs in 2023 to 79,900 jobs by 2033, an increase of approximately 8,400 jobs (forecast from Lightcast Q2 2023). The majority of that increase is expected to occur in Flagstaff (5,257 jobs) and Sedona (1,646 jobs).
- ◆ The predominance of job growth in the ECoNA region over the next ten years is forecasted to be in the Accommodations & Food Service industry - essentially restaurants and hotels. Health Care & Social Assistance is also forecasted for a significant increase. Administrative Support Services and Retail Trade are also forecasted for significant growth. However, the efforts of ECoNA and local communities to diversify the economy and attract higher wage jobs may result in a different mix of jobs over the long term.
- ◆ Short Term Rentals (STRs) advertised on sites such as Airbnb and Vrbo have become a significant housing issue for parts of the ECoNA region, but especially in Sedona and Flagstaff. State

legislation prevents cities and towns from prohibiting STRs. Of utmost concern with STRs is the conversion of housing units from permanent to transient use, many units which would be affordable to moderate income households. STRs can also change the character of the City’s residential neighborhoods and result in the reduction of property values for the community’s permanent residents. Unfortunately, STRs will be a significant part of the ECoNA region housing inventory until legislation is enacted at the State level to regulate them. Recent STR data from various sources appears to indicate that the market has not been materially affected by the COVID-19 pandemic and the industry is currently outperforming the hotel industry.

- ◆ The housing affordability gap for the entire ECoNA region is 15,400 units, or approximately 39.1% of total households. Renters comprise the majority of cost-overburdened households. An estimated 10,500 renter households are rent overburdened and an estimate 5,600 owner households are cost overburdened.
  - » The gap varies by community, but one of the largest groups of households affected are earning less than \$20,000. Throughout the ECoNA region, there are 5,130 households earning less than \$20,000 that are burdened by rent. These households are most appropriately housed in public housing units, typically owned by a government entity or non-profit, with rents set at 30% of the household’s income.
  - » There are an additional 6,550 households in the region earning between \$20,000 and \$50,000 per year that are overburdened by housing costs. This group could be served by additional Low Income Housing Tax Credit projects targeting 40%-60% AMI households.
  - » The third group of households, representing 3,680 households, earn over \$50,000 but are overburdened by housing costs. The majority of these households would likely qualify for workforce housing units targeting 60%-120% AMI. Additionally, a portion of these households could be candidates for homeownership assistance programs.

OWNER-OCCUPIED HOUSEHOLDS PAYING MORE THAN 30% OF INCOME TOWARDS HOUSING COSTS - BY INCOME RANGE							
	Camp Verde	Flagstaff	Sedona	Williams	Winslow	Coconino County	Arizona
Owner-Occupied Units	3,147	11,938	3,618	851	1,155	30,563	1,765,658
Less than \$20,000	326	583	332	88	147	1,841	103,013
\$20,000 to \$34,999	166	383	241	56	37	968	83,432
\$35,000 to \$49,999	88	564	253	8	31	896	70,749
\$50,000 to \$74,999	66	522	241	5	11	1,218	68,552
\$75,000 or more	105	366	274	4	9	675	43,848
<b>Total Cost Burdened</b>	<b>751</b>	<b>2,418</b>	<b>1,341</b>	<b>161</b>	<b>235</b>	<b>5,598</b>	<b>369,594</b>
<b>Percent Cost Burdened</b>	<b>23.9%</b>	<b>20.3%</b>	<b>37.1%</b>	<b>18.9%</b>	<b>20.3%</b>	<b>18.3%</b>	<b>20.9%</b>

Source: ACS 2021 5-year estimate

## RENTER-OCCUPIED HOUSEHOLDS PAYING MORE THAN 30% OF INCOME TOWARDS HOUSING COSTS - BY INCOME RANGE

	Camp Verde	Flagstaff	Sedona	Williams	Winslow	Coconino County	Arizona
Renter-Occupied Units	938	14,512	1,284	451	1,329	20,474	917,899
Less than \$20,000	240	2,825	229	151	207	3,550	136,344
\$20,000 to \$34,999	170	2,233	185	42	233	2,882	132,127
\$35,000 to \$49,999	2	1,639	177	27	13	1,993	84,454
\$50,000 to \$74,999	27	1,456	138	24	0	1,684	48,871
\$75,000 or more	0	387	44	0	0	387	10,874
<b>Total Cost Burdened</b>	<b>439</b>	<b>8,540</b>	<b>773</b>	<b>244</b>	<b>453</b>	<b>10,496</b>	<b>412,670</b>
<b>Percent Cost Burdened</b>	<b>46.8%</b>	<b>58.8%</b>	<b>60.2%</b>	<b>54.1%</b>	<b>34.1%</b>	<b>51.3%</b>	<b>45.0%</b>

Source: U.S. Census ACS 2021 5-year Estimate

- ◆ An additional source of affordable housing demand is the growth of employment as persons moving to the ECoNA region for work search for housing close to their place of employment. Employment growth for the ECoNA region over the next ten years is expected to reach 8,660 jobs. This employment forecast is adjusted by the percentage of dual income households and those households that would be expected to earn less than 100% of the area median income. Based on those criteria, the demand for affordable units is forecasted at 2,043 units throughout the ECoNA region over the next five years.

## AFFORDABLE HOUSING DEMAND FROM EMPLOYMENT GROWTH

Community	5-Year Demand	Annual Demand
Camp Verde	127	25
Flagstaff	1,296	259
Sedona	444	89
Williams	121	24
Winslow	54	11
<b>Total</b>	<b>2,043</b>	<b>409</b>

Source: Lightcast Q2 2023; Elliott D. Pollack & Company



## Housing Affordability Summary

The final five-year affordable housing gap for the ECoNA region is a combination of:

- ◆ Addressing the current shortage of affordable housing for existing residents equal to 15,355 units.
- ◆ Providing for the housing needs of low and moderate income persons who will be filling new employment opportunities within the region over the next five years. That demand is estimated at a total of 2,043 households.

ECONA REGION FIVE-YEAR AFFORDABLE HOUSING DEMAND			
Community	Existing Gap Demand	Forecasted Employment 5-Yr. Demand	Total 5-Yr. Demand
Camp Verde	1,190	127	1,317
Flagstaff	10,958	1,296	12,254
Sedona	2,114	444	2,558
Williams	405	121	526
Winslow	688	54	742
<b>Total</b>	<b>15,355</b>	<b>2,043</b>	<b>17,398</b>

Source: Lightcast Q2 2023; Elliott D. Pollack & Company

**In total, the five-year affordable housing demand is estimated at 17,398 units. Flagstaff accounts for 70% of the demand followed by Sedona at 15%.**

## SECTION 6: TARGETED SECTORS ANALYSIS

A critical component to the economic development strategy is to identify high value-add industries for which Northern Arizona has a real opportunity of both retaining and attracting with focused recruitment efforts to help drive the region's economy forward.

The make-up of every local economy can be simplified into two main components: export (base) industries and local serving industries. Export-related industries are the foundational drivers of a local or regional economy by importing money into the community by selling goods or services to outside regions. This money then circulates throughout local serving industries until leakage occurs, which is the spending of money outside of the economy.

### BASE INDUSTRIES

Export-Related Business Services, Retirement, etc.



### LOCAL MARKET INDUSTRIES

Retail, Construction, Local Business Services, Banks,  
Local Government

Both components of a community's economy are important. Base industries should be the main focus of economic development efforts because demand for these industries' products or services originates from outside the local market area and they are not reliant on local resident demand. This means that they can produce from anywhere and, when located in your community – in this case, the ECoNA region and its local municipalities - they create additional demand for local goods and services. This is often referred to as ripple effects or multiplier effects.

Local serving industries can also play an important role to the extent that there currently is not enough supply to satisfy local demand for any particular good or service. When gaps in supply exist, local dollars will leak out of the community and represent a lost opportunity for the local/regional community to capture its own local spending power.

It is vitally important for local government officials and economic developers to understand which businesses and industries have strong prospects in the near future and are most likely to succeed within their jurisdictions. Given the reality of limited resources that many communities face, a plan focused on retaining, recruiting and growing strategic targeted sectors and firms will maximize economic development endeavors. The targeted industries selected for this economic development strategy are those that are most likely to value and benefit from the locational attributes and business climate that the communities of ECoNA offer.

There is increasingly intensified competition for business retention, recruitment and startups. With limited resources, it is essential that ECoNA focus its economic development activities on businesses that would be the best fit and that would have the highest probability of growing, locating, starting up and succeeding in the region it encompasses.

Our methodology for identifying target sectors for ECoNA region entailed both quantitative and qualitative elements. We focused primarily on base industries - those industries that bring new wealth into the regional economy. Quantitatively, a review of historic industry trends in the ECoNA region as well as the outlook for future industry growth began this process. For the qualitative approach, we evaluated the region's business climate from the point of view of locally-based businesses as well as national site location consultants.

Based on these assessments, we identified well-suited industries that are most likely to value the region's economic and community attributes and assets and would be less affected by its competitive and locational disadvantages. Additionally, we augmented the preliminary target sectors with niche sectors representing new opportunities that may not be identified specifically in the regional trend data.

These targets are firms that are growing in the U.S. and regional economies and that would most benefit from the communities' assets and be willing to expand in and/or relocate to the ECoNA region, and that bring value to the region in the form of private capital investment, high-value-added jobs, and payroll. This target economic sector analysis provides ECoNA and its member communities with a list of industry groups to allocate resources to as part of the organization's business retention and recruitment initiatives that will drive the diversification of the region's economic base, reduce leakage of resident spending to outside communities, and provide additional employment opportunities to an already well-qualified workforce.

In addition to the presentation of recommended target industries for ECoNA, a high-level overview of the current trends in each targeted sector is provided, as well detailed information on the occupational skills and educational needs of businesses and industries within these sectors.

Based on our research and analysis, the recommended targeted sectors for ECoNA and the communities/region it represents are:



— **Manufacturing/Advanced Manufacturing:** This may include food, beverages, textiles, chemicals, nonmetallic minerals, metals, high technology, machinery and transportation equipment.



— **Transportation, Distribution, & Logistics:** truck including short and long-distance freight, specialized freight trucking, rail transportation, transload facilities, third party logistics, supply chain, freight forwarding, scenic and sightseeing transport, and support activities.



▪ **Professional, Scientific & Business Services:** legal, accounting, management, scientific, and technical consulting services, specialized design services, management and technical consulting, office administration services, etc.



▪ **Biomedical/Health Care:** research and development, healthcare technology, health practitioners, physical/occupational therapists, outpatient care, medical diagnostics services, and hospitals.



▪ **Arts, Entertainment and Accommodations:** spectator sports, sports centers, attractions, hotels, RV parks, campgrounds, etc.

## **SECTION 7: STAKEHOLDER PERSPECTIVES / STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT) ANALYSIS**

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Understanding where the region now stands in terms of stakeholder perspectives about Northern Arizona provides the basis for identifying assets that need to be treasured and strengthened; weaknesses that need to be minimized or ameliorated; opportunities that will enhance the region’s livability and economic health and competitiveness, and internal and external threats that need to be factored into all facets of ECoNA’s represented communities as well as the organization for planning and budgeting.

Beginning November 2022 through February 2023, our team conducted a SWOT analysis as a fundamental building block for ECoNA’s economic development strategic plan. One-on-one interviews were conducted directly engaging representatives of the ECoNA region’s public, private and civic communities; educational officials; state and regional leaders, and external business/industry experts. We also conducted six stakeholder roundtables with the direct participation of additional business, arts/culture, education, public officials, major employers and other key leaders whose work directly impacts the economic development, quality of life and quality of place in Northern Arizona. Combined, the 80 stakeholders who participated in the SWOT process included:

- ◆ Business executives
- ◆ Community and civic leaders
- ◆ Public sector officials from local, county and state government
- ◆ Educational leaders - K-12 through postsecondary institutions
- ◆ Small business owners
- ◆ Artists and arts advocates
- ◆ Nonprofit organization leaders
- ◆ Commercial-Industrial brokers and developers
- ◆ C-suite executives and national experts in economic development, business locations, hospitality and tourism and advanced technologies and other targeted economic sectors

In addition, a review of all prior economic development-related strategies, plans and studies was conducted to maximize existing information and investments in these endeavors.

The SWOT assessment provides invaluable insights into where ECoNA and its member communities may choose to devote their collective time, energy, investments and policymaking for the economic development of the region. Just as important, the SWOT assessment provides the framework for the region’s economic development strategy and a “move ahead” action plan. Our team is very appreciative of the enormous investment of time and consideration invested by all of the stakeholders who participated in this SWOT assessment, as well as by the ECoNA organization in arranging the interviews of all of these individuals.

In the course of our many conversations about Northern Arizona’s economic future, stakeholders also shared input for the ECoNA organization, including suggestions for collaboration and networking; desired projects or support for existing projects; clarification of ECoNA’s mission and activities, and requests for information about participation in ECoNA’s work. This stakeholder input is invaluable to the overall efficacy of Northern Arizona’s economic development efforts, and it has been incorporated into goals of the roadmap.

The SWOT analysis has been organized based on six critical mainstays that directly support, contribute to and determine economic diversification, sustainability and resiliency with the overarching goal of creating more opportunities for community prosperity that will benefit all segments of the Northern Arizona population and economy today, and for generations to come.

These critical economic mainstays are described below, and in the full SWOT report, our team provided the most up-to-date research explaining why these mainstays matter to cities, states and regions in terms of building resilient, competitive and sustainable economies.



▪ **Locational Assets and Business Climate:** Encompasses the competitiveness and desirability of a community for business growth and success, and includes proximity to other markets/metro areas; access to major airports and interstates; access to suppliers and other goods and services; the relative tax burden for business and people; the cost of doing business; local and state tax burdens, local and regional amenities, and the relative business friendliness of governmental entities and the support environment for innovation and business growth.



▪ **Governance and Leadership:** Pertains to how a local government plans and prepares for the delivery of services, the quality of those public services, the integrity of public sector processes in permitting and entitlements, stability of public sector finances, budgeting and deployment of financial resources, and integrity of public election and appointment processes.



▪ **Infrastructure and Growth Capacity:** Focuses on the foundational importance that water/wastewater, power, transportation, broadband and land use have on economic growth and sustainability.



▪ **Talent Development and Education/Training:** Entails ensuring that children, youth and adults are prepared for college or careers through K-12 and postsecondary education and training systems and opportunities that deliver the knowledge, skills and opportunities required in today's and tomorrow's economy.



▪ **Civic Community, Culture and Quality of Life / Place:** Reflects the “heart and soul” of a community and its people, as well as the livability and quality of life and place that encompass a diversity of lifestyles, amenities, activities - indoor and outdoor - that appeal to a broad range of interests and aspirations.



▪ **Economic Development Programs and Resources:** Incorporates the ability of business and government to work collaboratively toward common goals, the funding and investment in economic development programs and resources, availability and quality of business assistance programs, especially for entrepreneurs and small businesses, and the charter and resources given to the primary economic development organization.

### Top 12 Strengths

- ◆ Diversity of regional communities, each of which brings an important value proposition to the entire region.
- ◆ Richness of a diverse population and the advantages of having people of different cultures, races, religions and ways of thinking.
- ◆ Beautiful, safe and friendly quality of place, drawing area-committed residents.
- ◆ Majestic natural beauty in a mountain, four-season setting with a broad range of outdoor recreation and experience opportunities.
- ◆ Highly educated workforce.
- ◆ Northern Arizona University (NAU).
- ◆ Substantial and multimodal transportation infrastructure: Interstate highways (I-17, I-40, Route 66); major state routes; BNSF Railroad and Flagstaff Pulliam Airport.
- ◆ Lowell Observatory.
- ◆ Growing major private sector employers across multiple economic sectors.
- ◆ Camp Navajo Army Base.
- ◆ Clean air and clean water.
- ◆ Strong public and institutional ethic for protecting rivers, forests, ecosystems and natural resources.

### Top 12 Weaknesses

- ◆ Insufficient workforce to keep up with the demand for qualified workers; while conversely, there is a higher than state average unemployment rate in the region. Insufficiently diverse career opportunities, including entry level, trades and specialty fields, both to sustain the local communities and to enable young people to remain.
- ◆ Insufficient/inadequate accessible/affordable housing for college graduates, young professionals, workforce and even executive-level business workers; over-conversion of housing stock to seasonal 2<sup>nd</sup> homes, short-term rentals, and student rentals.
- ◆ Exodus of talent to other communities or entirely different regions where housing is more affordable and/or jobs more plentiful; commuting long distances is a growing concern for employers and employees.
- ◆ Labor force shortages and changing values of today's workforce are making it very difficult to fill jobs.
- ◆ Lack of identifiable shovel-ready sites as well as lack of shovel-ready sites that can accommodate a larger employer that would bring immense value-add to the community (one that is desirable to the local government and community).
- ◆ Underdeveloped entrepreneurship ecosystem; very low rate of venture capital investments.
- ◆ Increasing anti-growth policies and voices both within certain municipalities and among citizenry of the region.
- ◆ Insufficient rail infrastructure, off-ramps and very limited availability of land next to the rail line; high cost and environmental regulations increase difficulty of building out additional rail.
- ◆ Inadequate public transit system, internally both within communities, e.g., Flagstaff and Winslow, as well as inadequate external transit systems between geographically compatible communities to facilitate regional employment, shopping, education, recreation.

- ◆ Cities/towns' lack of capacity to fully function in unusual circumstances, e.g., forest fires and flooding, Covid-19 pandemic, etc., hampers their ability to provide services.
- ◆ Business and economic development organizations are not aligned, and meaningful cooperation/collaboration is lacking.
- ◆ Inability to recruit skilled professional staff for both the public and private sectors and great difficulty in hiring experienced, knowledgeable talent for science, technology, engineering, and math (STEM). and mid-to-upper level managers; this problem is largely due to the lack of available/affordable housing in the region.

## TOP 12 OPPORTUNITIES

### Top 12 Opportunities

- ◆ Champion and adopt municipal/county public policies that will catalyze housing development in the region, including attainable/accessible workforce housing.
- ◆ Expand local and regional transit systems and install bus stops at major employer sites.
- ◆ Invest in additional rail infrastructure, through a multijurisdictional partnership to free rail adjacent state or federal lands; opportunities for importing lumber, plastics, fuel and exporting new manufacturing products.
- ◆ Recruit and support the establishment of trade schools that provide job-oriented training for skilled trades that are needed by existing business and industry.
- ◆ Build and expand the entrepreneurial ecosystem in Northern Arizona by supporting a culture of local, small business support and resilience and by facilitating resource connection, networking and training opportunities.
- ◆ Establish incentive programs for medical personnel to train and stay in Northern Arizona, e.g., tuition for graduates who agree to practice in Northern Arizona for a defined period of time.
- ◆ Strengthen and expand the biomedical / biotech sector, building upon the concentration of existing firms in Northern Arizona.
- ◆ Continue to support Lowell Observatory's expansion.
- ◆ Continue to implement the flood mitigation measures that have been approved.
- ◆ Increase the capacity of Flagstaff Pulliam Airport, e.g., attract and retain more commercial daily flights.
- ◆ Expand broadband throughout the entire region, including the most underserved communities.
- ◆ Continue management of the region's water portfolio, including increasing potable reuse.



## Top 12 Threats

- ◆ Continued lack of action to address the acute housing shortage and to plan for and promote the development of housing to accommodate current and future residents, including employees, recent college graduates, medical professionals.
- ◆ Drought in the Western United States.
- ◆ Increasing water scarcity in Arizona.
- ◆ Natural disasters, e.g., fires and resulting floods due to burn scars.
- ◆ Failure of federal government to appropriate sufficient funding to the United States Forestry Service (USFS) for forestry management and flood mitigation - this has shifted the burden of paying for firefighting, flood mitigation, etc., on local and county governments.
- ◆ Lack of action to reverse the exodus of young, college educated workers in search of more accessible housing.
- ◆ Inaction on the part of the municipal/county governments to better connect and engage with existing employers and small businesses to earnestly address concerns about the increasingly hostile business climate within certain segments of the public sector.
- ◆ Wage inflation and other increased business costs created by local policies further erode Northern Arizona's competitiveness as a business location; this encompasses the persistent higher than average cost of living in the region, largely due to escalating housing prices as well as burdensome, high-cost government policies and regulations.
- ◆ Continued escalation of highly vocal anti-growth contingent - both within certain public sector entities and among citizenry.
- ◆ Inaction to invest in and expand public transit locally and regionally.
- ◆ Declining population based on current and future projections for many of the municipalities in the ECoNA region; some communities have zero growth, some are experiencing population decline, and two communities have very minimal population growth.
- ◆ The deteriorating fabric of the community into a "tourist town" that is pushing permanent residents out in favor of short-term rentals and seasonal homes.

# SECTION 8: GROWTH OPPORTUNITIES

Growth areas throughout the ECoNA region have been identified and prioritized through previously published area plans and through stakeholder interviews. They consist of the following.

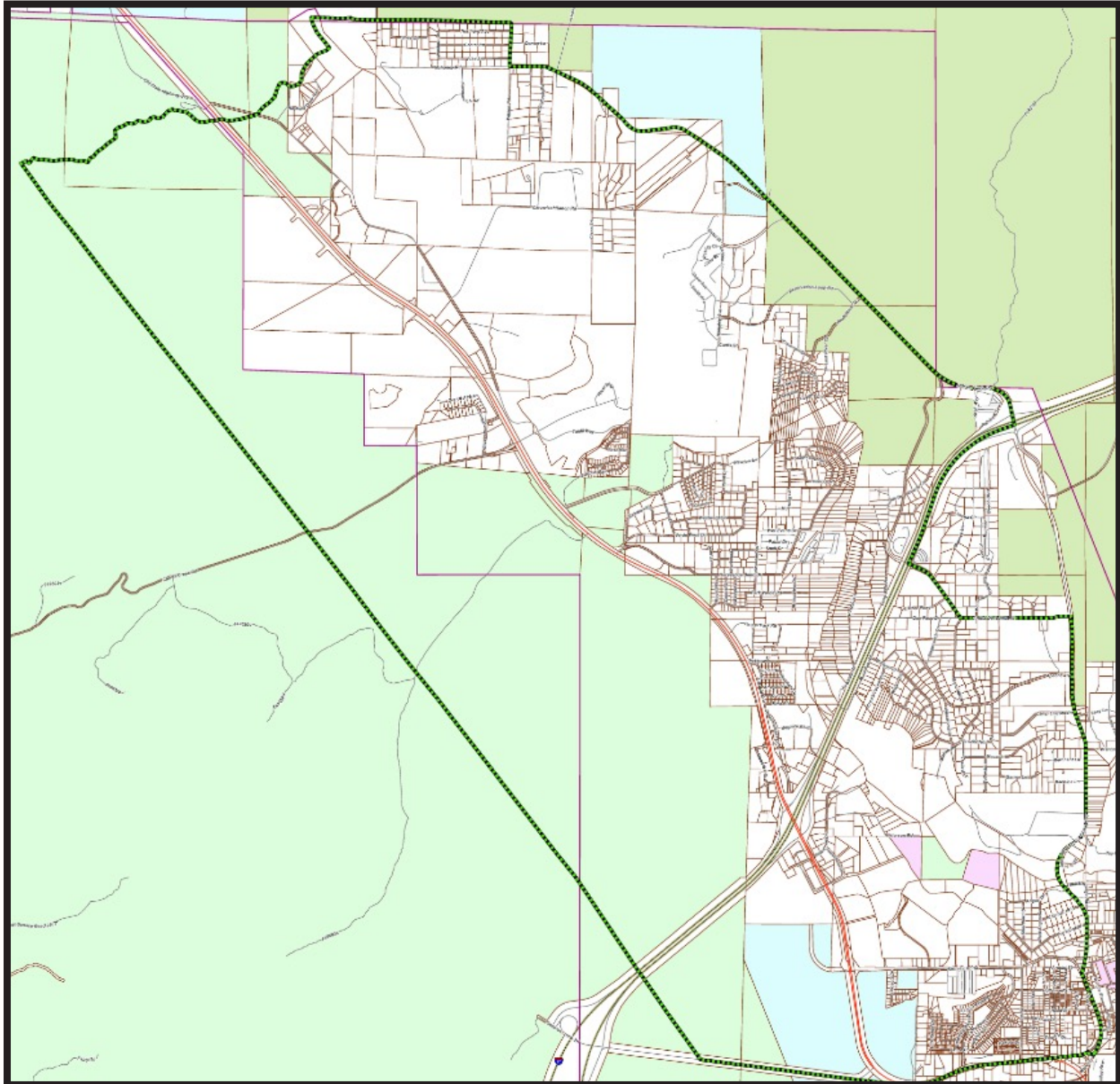
## Camp Verde

The Town of Camp Verde has access to an impressive workforce base located within reasonable driving distance to Phoenix, Prescott, and Flagstaff. State highway and interstate highway access create opportunities to attract targeted sectors such as Transportation, Distribution, and Logistics, Manufacturing, and Tourism. The following areas have been identified for future employment and population growth.

- 1. Verde Valley Industrial Park - Available power, water, and natural gas. Easy access to State Route 260 and proximity to I-17. Recent activity includes Frametec, which is building a 110,000 square foot facility to manufacture roof and floor trusses and will create 180 jobs.



2. Camp Verde Opportunity Zone - Camp Verde's opportunity zone is a 20 square mile area that includes the Town's historic downtown, the commercial district on Finney Flat Road and extends west along the State Route 260. This area has consistently been designated as the town's "growth corridor." Investments in this area could include new commerce and industry as well as new housing of all types, with a focus on multi-family development to promote affordability and attract younger workers.



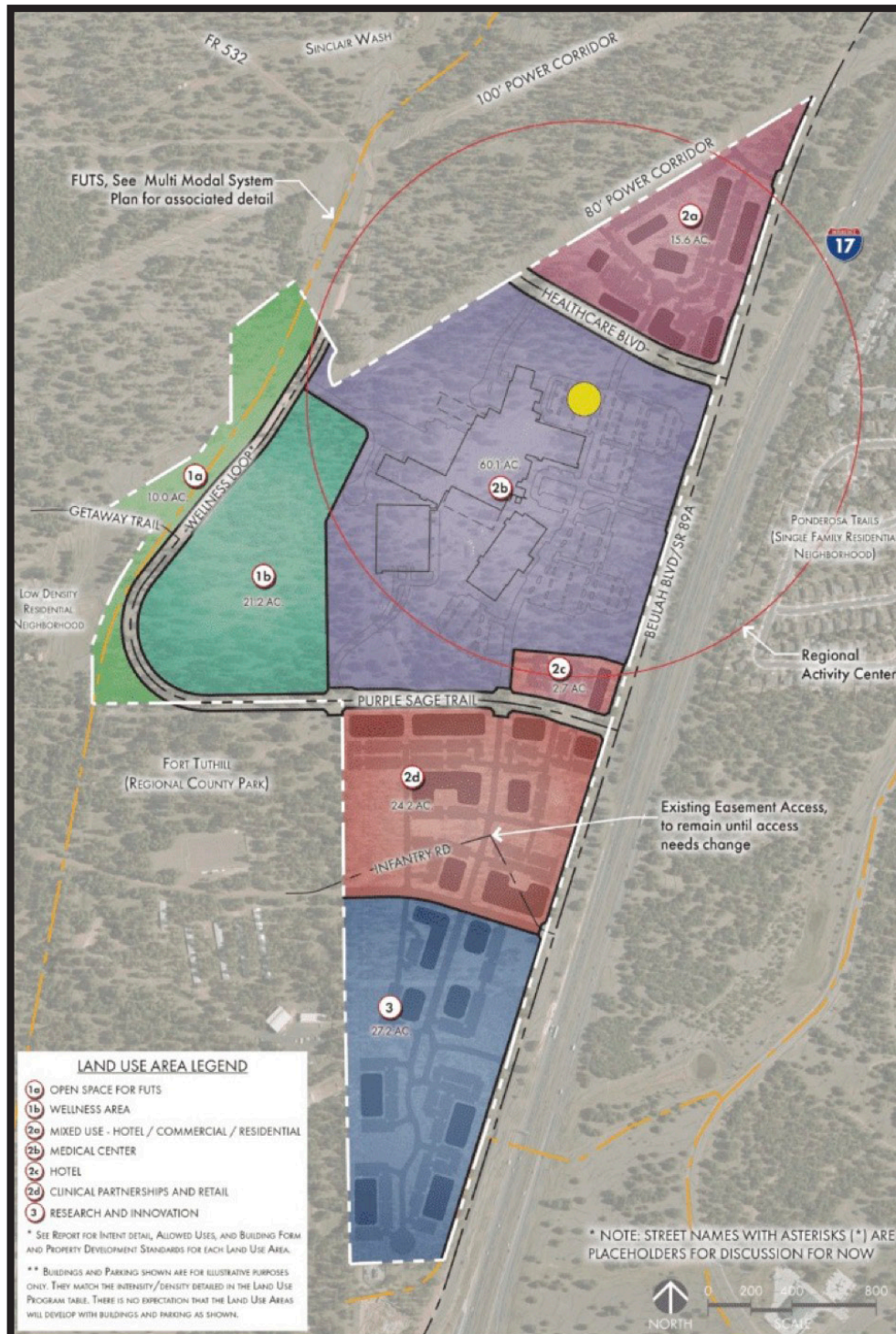
## ***Flagstaff***

The City of Flagstaff has numerous growth area opportunities within and surrounding the city.

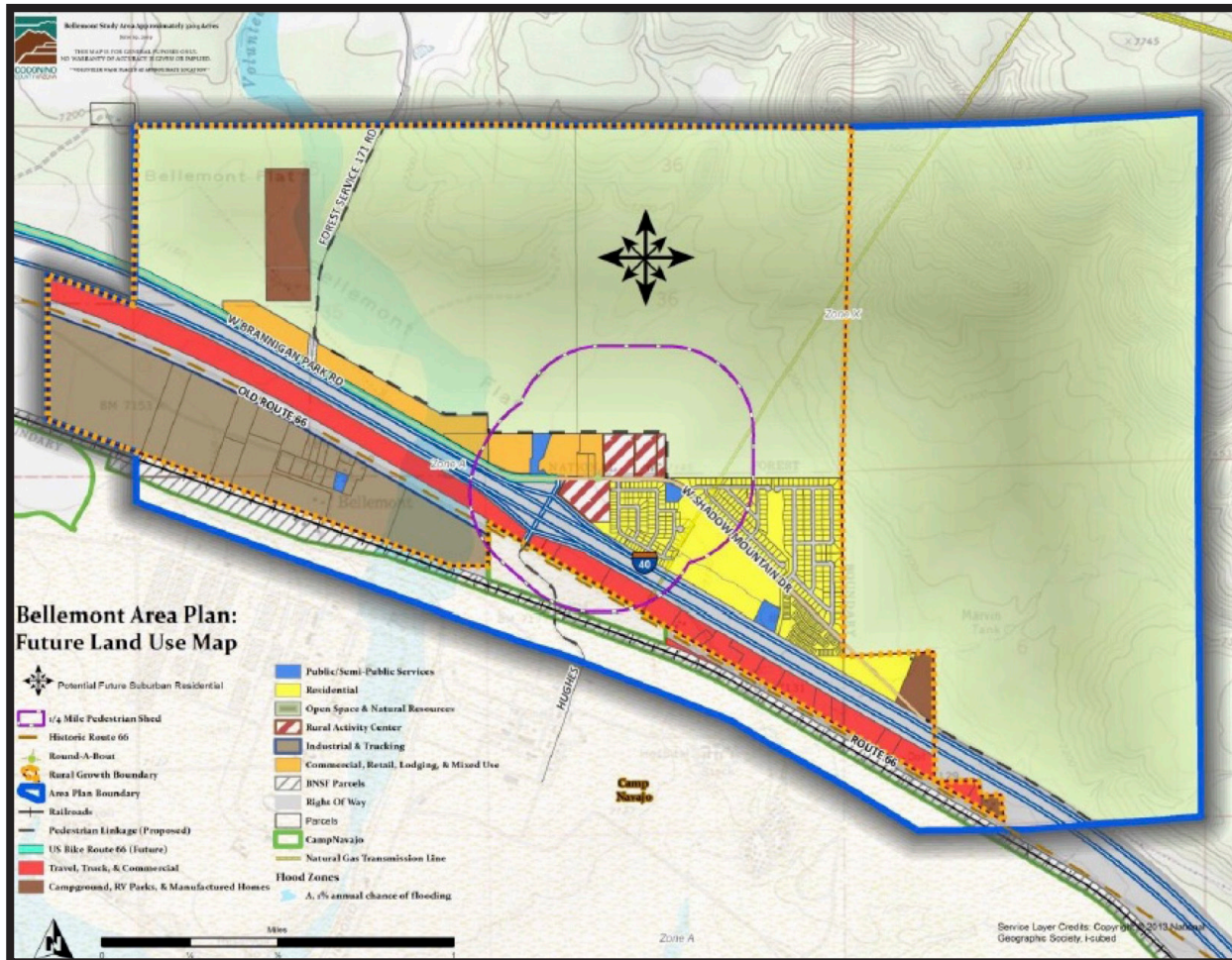
1. Airport Business Park - A 32 acre bioscience, technology and research park offering owned by the City of Flagstaff. Current planning efforts envision over 750,000 square feet of research and development, manufacturing, and hospitality space.



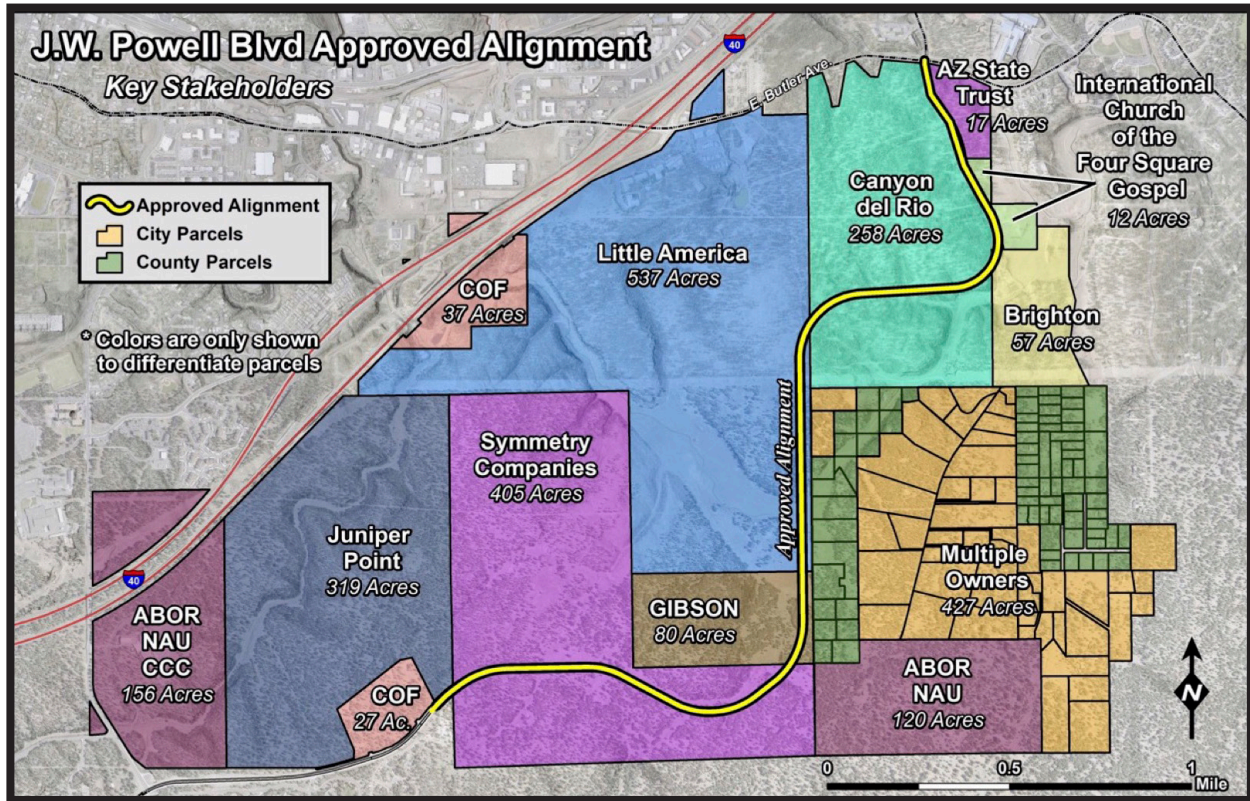
2. **NAH Wellness Village** - The proposed NAH Wellness Village includes hospital-based health care, outpatient surgery, imaging, rehabilitation and clinic spaces all on one site. The master plan also includes amenities such as new housing, dining, retail, grocery, lodging and a 22-acre natural retreat with trails integrated with Flagstaff's existing trail system. The infrastructure required for the NAH Wellness Village will also help activate hundreds of acres of developable land in the immediate area for new housing.



3. Bellemont/Camp Navajo - Located just 12 miles from Flagstaff along I-40, Bellemont is home to several manufacturing and forestry businesses, Camp Navajo Arizona National Guard Base, travel/hospitality amenities, and housing at more affordable levels compared to City of Flagstaff. Bellemont's specific area plan recommends additional industry, campgrounds, RV parks, and manufactured housing along the south side of I-40 as well as commercial, mixed use, and residential expansion along the north side of I-40. Areas on the northern edge of Camp Navajo near I-40 have also been identified for potential uses such as manufacturing, transportation, distribution, and logistics.

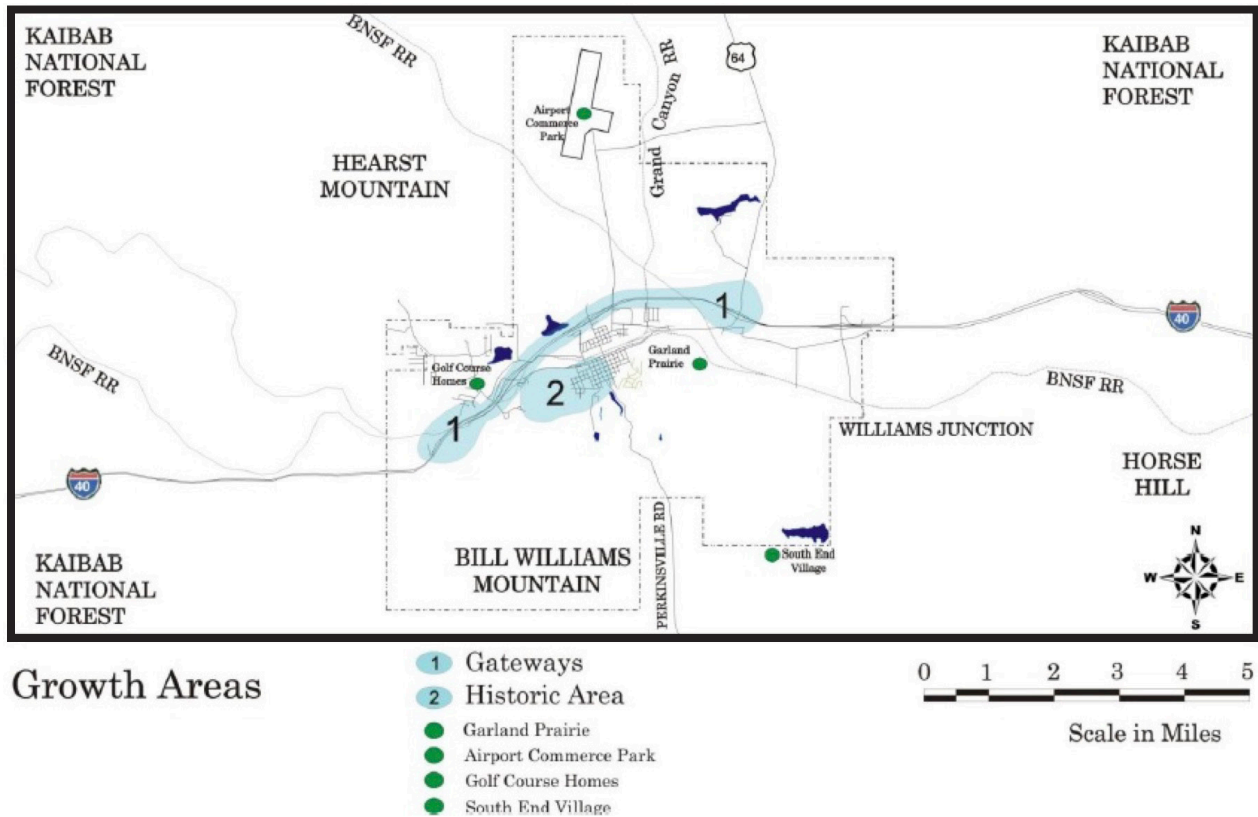


- JW Powell Boulevard Expansion Corridor - The extension of JW Powell Boulevard will service 2,200 acres and will include bicycle and pedestrian improvements. Completion of the roadway will help activate several master planned communities that have been planned to include housing of various types and density as well as commercial areas.



## Williams

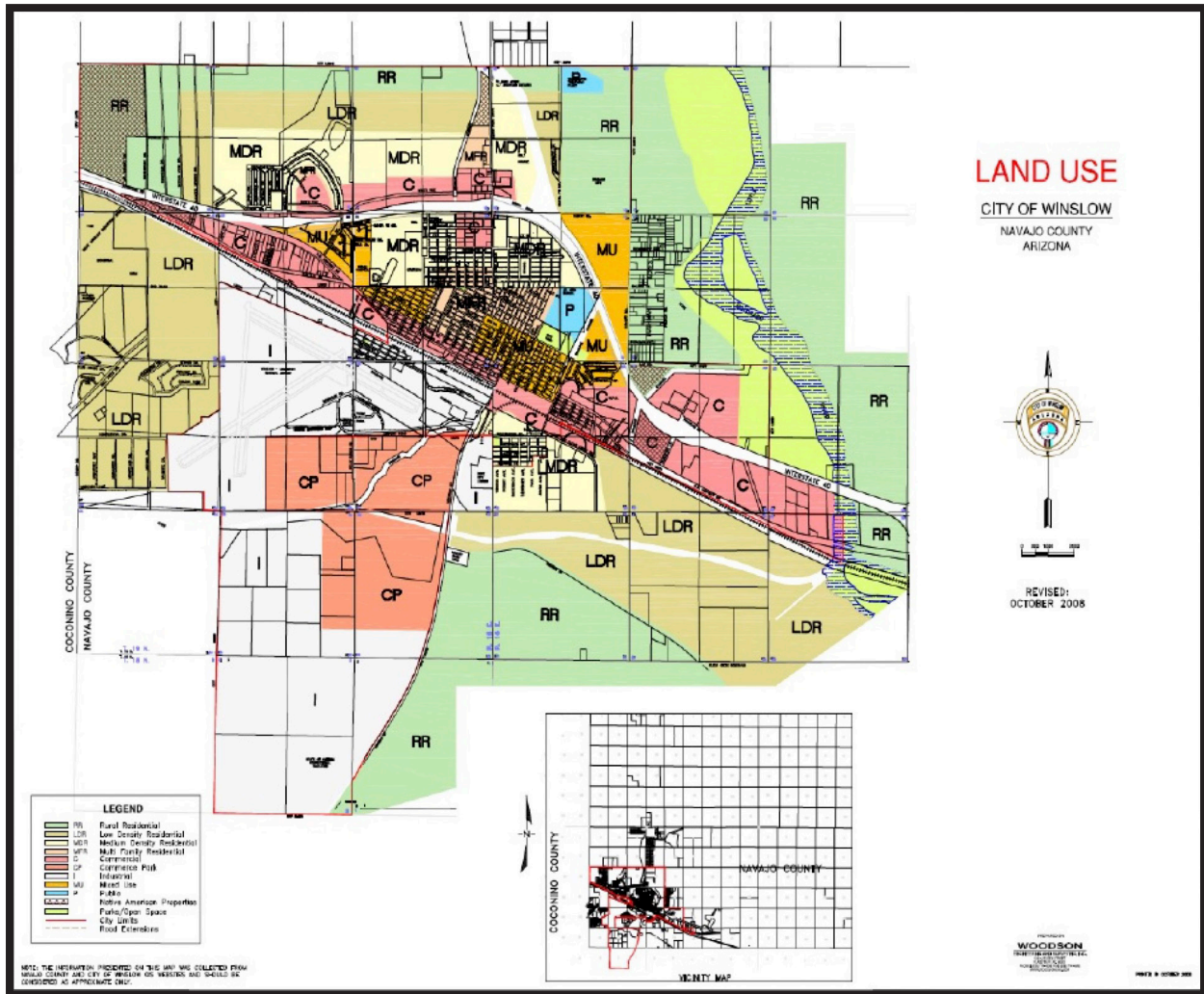
The area on the south side of Interstate 40 at the Garland Prairie interchange, east of State Route 64, has been identified as a potential center of employment for Williams. In addition, the City of Williams' Main Street, the airport area, and the I-40 corridor have been identified as potential growth areas for employment, retail, and tourism.





# Winslow

The City of Winslow has abundant land resources for growth opportunities in the identified targeted sectors. Commercial frontage within the city's downtown as well as Mike's Pike and North Park can accommodate additional retail, restaurants, entertainment, hospitality, or professional service related operations. There is also potential for a large-scale commerce park adjacent to the airport served by both the highway and rail line that would be ideal for transportation, logistics, distribution, and a variety of manufacturing businesses.



## Sedona

Sedona's most substantial opportunity to expand its inventory of more attainable housing, identified via City staff within the Housing Needs Assessment are the city-owned parcels to the west of the City near the wastewater treatment plant along State Route 89A. This area consists of 226 acres and could accommodate a substantial number of new homes to help house the local workforce at attainable prices.



# SECTION 9: FORGING THE FUTURE: A ROADMAP FOR NORTHERN ARIZONA'S ECONOMIC DEVELOPMENT

No governmental or organizational entity, or group of such entities, can attain success in economic development without the full and active engagement, teamwork and alignment of all sectors and institutions - public, private and nonprofit - encompassing government, business, community members, educational institutions, healthcare organizations, nonprofits and other civic institutions.

Based on the comprehensive economic, workforce, housing, competitor market and other analyses conducted as the foundation for this economic development strategy, as well as engaging 80 stakeholders and developing a SWOT analysis, it is clear that ECoNA, with its private, public, educational and civic partners in full alignment, should embark on ambitious but attainable strategic initiatives to advance the economic development of the community as well as its long term sustainability and resilience.

Our research and analyses point to the need to address gaps in some of the most basic but mission critical foundational building blocks while also maximizing Northern Arizona's considerable assets, amenities and unique differences among its many municipalities - a decided strength for a dynamic and sustainable regional market.

Equally important, given the abundance of assets upon which the Northern Arizona region can capitalize to further diversify and strengthen its economy, there are other measures which if addressed over time, all of the jurisdictions in the ECoNA partnership can sustain economic dynamism and resiliency to ensure that the entire region is sustainable for generations to come.

Six primary goals will serve as guideposts for ECoNA as well as the communities and sectors comprising the Northern Arizona region that the organization represents:

- Goal 1: Strengthen and Improve Locational Assets and Business Climate**
- Goal 2: Invest in and Build Quality of Life / Quality of Place Necessities and Amenities**
- Goal 3: Develop and Grow the Region's Workforce through Collaboration, Education and Training**
- Goal 4: Expand Investment in and Completion of Infrastructure and Growth Capacity**
- Goal 5: Invest in, Expand and Evaluate Economic Development Programs and Resources**
- Goal 6: Strengthen Existing and Build New Regional, State and Federal Partnerships to Leverage Economic Development Opportunities**

For each goal, there are several objectives, all derived from the data-driven analyses that were prepared as building blocks for this economic development strategy. In addition, best practice key performance indicators (metrics) were also researched for each of these strategic goals and are offered below.

## ***Goal 1: Strengthen and Improve Locational Assets and Business Climate***

- ◆ Continue to address both perceived as well as real business climate issues region-wide; the ECoNA region is generally perceived as being dominated by both public bodies and their policies as well as increasing numbers of residents who generally oppose change and population and business growth.
- ◆ Twice annually, conduct a third-party administered confidential survey of all businesses in each jurisdiction to establish a measurable baseline of perceptions and concerns about operating a business in the ECoNA region; publish the results and spur action to improve the region's business climate.
- ◆ Inventory and develop a portfolio of well-planned, shovel ready sites suitable for employers and their operations:
  - » Develop an interactive inventory of all vacant, developable and available land throughout ECoNA's region including land both adjacent and proximate to the Flagstaff Pulliam Airport, Northern Arizona Healthcare's new medical campus and other locations as well.
  - » Work with the USFS to sell/trade land to free up land for other uses, including employment and housing.
  - » Encourage municipal and county governments, as well as private landowners, to responsibly plan for the sale of lands they own/control so that it can be utilized for well-planned housing developments.
- ◆ Continue to advocate for and advance economic development sites and projects where more near-term opportunities exist:
  - » Winslow Innovation & Logistics Hub; this partnership represents an opportunity to develop shovel ready sites in Winslow in collaboration with three major transportation and logistics companies.
  - » Full build-out/development of the 1,200 acres west of Northern Arizona Healthcare's new medical campus, which will have infrastructure brought to it; these 1,200 acres are ready to develop, and an additional 400 acres of state land would be development ready as well.
  - » Bellemont/Camp Navajo area located along I-40 near Flagstaff and access to BNSF rail line. This area can expand its manufacturing cluster and attract transportation/logistics opportunities.
  - » Camp Verde's Verde Valley Industrial Park - now home to Frametec manufacturing facility and U.S. corporate headquarters.
- ◆ Strengthen and expand Northern Arizona's targeted economic sectors, including:
  - » The biomedical / biotech / healthcare sector, building upon both the concentration of these firms and institutions already located in Northern Arizona as well as Northern Arizona Healthcare's new nearly \$1 billion medical campus.
  - » Manufacturing / advanced manufacturing, capitalizing on transportation networks throughout the region and the existing base of talent.
  - » Target and recruit supply and logistic support firms to service existing regional manufacturing needs, keep dollars in the region, create cost and time efficiencies for existing business.

- » Transportation, logistics, and distribution, leveraging interstate highway access, rail, and air transportation availability.
- » Professional, scientific, and business services to expand opportunities for Northern Arizona University (NAU) and Coconino Community College graduates, provide higher wage services opportunities, and maximize remote worker attraction.
- » Tourism and hospitality, expanding the region’s most prevalent base industry, capitalize on the region’s natural beauty, increase the potential pool of visitors, and increase visitor length of stay with more diverse offerings.
- ◆ Vigorously support and advance the retention and expansion of existing institutions and business, including:
  - » Lowell Observatory’s expansion.
  - » Employers already present in Northern Arizona who need to grow their operations.
- ◆ Build and expand the entrepreneurial ecosystem in Northern Arizona to increase the level of entrepreneurship in the region:
  - » Increase the output of NACET and other entrepreneurship programs.
  - » Support the expansion of existing incubation services for entrepreneurs to foster startups and leverage profitable niche businesses, with a focus in small communities that do not have “factory-sized” infrastructure and capacity.
  - » Examine the potential of recruiting other well-established incubators, accelerators and mentorship organizations and resources to locate and operate in Northern Arizona.
- ◆ Strengthen the collaboration between the City of Flagstaff and Northern Arizona University (NAU) for planning and coordination for carbon neutral deadlines, future degree and training needs for the region and collaboration on infrastructure projects.
- ◆ Strengthen Business to Business (B2B) networking and collaboration opportunities for recycling, workforce training, attracting supply and logistics partners, gaining critical mass and cost savings.
- ◆ Continue to strengthen the region’s business and public sector relationships with both Canada and Mexico, both of which are key trading partners with Arizona:
  - » Survey existing firms and municipal/county governments to inventory their trade and other relations with Canada and Mexico.
  - » Identify areas for increased visitor/tourism and B2B trade with Canadian and Mexican companies.
  - » Utilize networks/contacts of existing Northern Arizona companies to host visiting delegations and identify/train local “ambassadors” to serve as leading hosts for these and other international delegations.

### **Metrics/Milestones to Assess Progress**

- Implementation of an annual business climate survey and publication of its results.
- Public policies enacted to ameliorate/minimize competitive disadvantages as well improving the regional business climate.
- A current and all-inclusive inventory of available sites as well as parcels that could become available (and by when).
- A consistent and effective communications/outreach program with landowners to learn more about their intentions and inform them about the need for sites for business and industry in Northern Arizona.

- An increase in shovel-ready sites suitable for employers across a broad range of economic sectors, and specifically, in the five targeted sectors for the ECoNA region.
- Increase in the expansion/location of firms in ECoNA's five targeted sectors.
- Successful completion of Lowell Observatory's expansion.
- Successful completion of Northern Arizona Healthcare's full-build out of its medical campus.
- Increase in the number of business startups in Northern Arizona.
- Increase in the number of providers, resources and funding for entrepreneurs in Northern Arizona.
- Improved collaboration between and among business, government and education as borne out of an annual third party administered survey with published results.
- Increased trade B2B between Northern Arizona businesses and institutions and Canada and Mexico.
- Increased visitor/tourism activity in Northern Arizona originating from Canada and Mexico.

## ***Goal 2: Invest in and Build Quality of Life / Quality of Place Necessities and Amenities***

- ◆ Continue to plan for and strongly encourage the development of a broad range of housing options to accommodate all generations and with a particular focus on retaining and recruiting NAU graduates as well as young workers.
- ◆ Focus on the development of affordable, attainable housing, especially at lower-income and workforce level wages, targeting households with incomes ranging from 40%-120% of the area's median income.
- ◆ Acknowledge, accommodate and support special needs related to the commuter workforce, including travel costs, time and logistics.
- ◆ Support the expansion and enhancement of arts and cultural venues and offerings within the communities.
- ◆ Support programming to address social determinants of health, including access to food, housing, health care, physical recreation.
- ◆ Increase health care services, including specialized medicine and mental health providers.
- ◆ Decrease rates of crime in high crime areas.

### **Metrics/Milestones to Assess Progress**

- Increase in number of new attainable dwelling units that can accommodate existing and future talent.
- Increase in availability of temporary housing options for recruiting new employees.
- Approve residential developments of all varieties - multi-family, manufactured housing, build for rent communities, single family detached homes to increase supply across the region to allow for growth and promote affordability.
- Decrease in the length of time to acquire building permits.

- Attraction of an entertainment venue / increase the number of festivals/events/ concerts for local residents and visitors
- Increase the number of specialized health care providers

### ***Goal 3: Develop and Grow the Region's Workforce through Collaboration, Education and Training***

- ◆ Elevate and improve collaboration between the region's public, private and education sectors to:
  - » Strengthen and improve the alignment of public workforce and corporate and business partners; improve access, service, create benchmarks and institute best practices.
  - » Develop better job training pathways and placement processes between employers and post-secondary education institutions.
  - » Coordinate a better alignment between forestry educational programs and forest industry workforce needs.
  - » Increase coordination across jurisdictions, including tribes, to utilize federal workforce development funds. Funds are spread thinly across multiple organizations; improved coordination could lever the dollars for maximum benefit.
  - » Strengthen relationships between Northern Arizona University (NAU) and the business community for mutual benefit.
- ◆ Continue to recruit and support the creation of well-established, respected trade schools that provide job-oriented training for skilled trades that are needed by existing business and industry:
  - » Establish a "mobile trade school" that takes training programs to where they are needed, or to rural areas without education facilities, including small rural communities, Arizona State Prison in Winslow, Yavapai Prison and tribal communities.
  - » Build, support and expand the number/availability of credentialed and certificate training programs at Community Colleges and trade schools, e.g., law enforcement, engineering, machinery, controls, electricians, pipe fittings, welding.
- ◆ Prepare, retain and grow the talent pipeline in our "own backyard" by:
  - » Developing programs to stay connected with college graduates from NAU and Coconino Community College and keep them in the community.
  - » Connecting with high school students to keep them informed and knowledgeable about career and college opportunities in Northern Arizona.
  - » Work with appropriate partners to identify and establish support systems to prepare, train and integrate immigrant labor into the regional workforce.
  - » Increase the number of youth apprenticeship (16+) opportunities in targeted economic sectors experiencing positive job growth that offer great career opportunities.
  - » Expand industry collaborations with K-12 and community college to train/educate youth.
  - » Increase the volume of paid internships for high school and college students in both the private and public sectors.
  - » Support and expand trade education for tribal communities and provide scholarships to encourage education at any postsecondary level.
  - » Improve regional cooperation between geographically accessible communities, including

St. John's, Winslow, Holbrook and the region's Native American communities.

- » Establish incentive programs for medical personnel to train and stay in Northern Arizona, e.g., waive tuition for graduates who agree to practice in Northern Arizona for a defined period of time.
  - » Identify and promote opportunities to coordinate with the military base for training purposes to put training facilities onto the military base, and to prepare military personnel for employment in the region upon their exit from service.
  - » Capitalize on Northern Arizona Healthcare's new medical center expansion in Flagstaff, which will include a nursing training and simulation center, to expand the healthcare talent base.
- ◆ Examine and pursue the potential of becoming a training location for airline pilots; there are current pilot, crew and plane shortages; the region has the area to do this specialized training; Winslow has airport capacity for commercial airport (Winslow Lindbergh Regional Airport).

### **Metrics/Milestones to Assess Progress**

- Increase in collaborative / joint curricula development and training programs that fully engage input from the employer community.
- Successful recruitment of at least one trade school that offers specialized training and certificates for the most in-demand jobs that existing employers are clamoring for.
- Increase in the number of graduates from Coconino Community College and Northern Arizona University (NAU) who remain, live and work in Northern Arizona.
- Increase in the regional workforce.
- Increase the labor force participation rate.
- Maintain a low unemployment rate.
- Increase in the number of apprenticeships in Northern Arizona.
- Increase in the number of paid internships in Northern Arizona.
- Increase in the number of veterans participating in the regional workforce.
- Completion of a feasibility study / initiative to establish a pilot training school or program in Northern Arizona.

### ***Goal 4: Expand Investment in and Completion of Infrastructure and Growth Capacity***

- ◆ Expand the public transit system and network to provide for more access to places of work and regional amenities, while reducing automobile commutes.
- ◆ Expand the local transportation system and install bus stops at major employer sites.
- ◆ Develop the John Wesley Powell Corridor.
- ◆ Widen I-17.
- ◆ Increase the capacity of Flagstaff Pulliam Airport, e.g., attract and retain more commercial daily flights.
- ◆ Expand broadband throughout the entire region, including the most underserved communities.
- ◆ Invest in additional rail infrastructure, through a multijurisdictional partnership to free



rail adjacent state or federal lands; opportunities for importing lumber, plastics, fuel and exporting new manufacturing products.

- ◆ Continue to actively pursue and win federal and state grant funding that currently is available for major infrastructure projects; the region needs to pursue these grants to fund essential infrastructure.
- ◆ Continue management of the region's water portfolio, including increasing potable reuse.
- ◆ Support the repair of the levee in Winslow (critical cross-over for BNSF Railroad) and for the U.S. Army Corps of Engineers to get this work done.
- ◆ Capitalize on the current availability of federal grants for infrastructure, particularly for multijurisdictional projects.
- ◆ Examine and advance opportunities to replace the Navajo Nation's coal generating station with wind and solar power; utilize the County's Utility Scale Renewable Energy Ordinance as a potential incentive.
- ◆ Complete the expansion of sewer infrastructure to Camp Verde Opportunity Zone to create additional development opportunities.
- ◆ Utilize existing economic development tools such as Community Facilities Districts (CFD) and Government Property Lease Excise Tax (GPLET), to make exaction more palatable to private industry.

#### **Metrics/Milestones to Assess Progress**

- Successfully construct required infrastructure - road widening, water, wastewater, etc. - for the proposed NAH Wellness Village.
- Extend JW Powell Boulevard as proposed.
- Number of new flight destinations to major markets added/restored.
- Number of new bus stops within short walking distance to major employers.
- Square miles of broadband access added.
- Successfully develop new rail-served facilities including transload/offload capabilities.
- Number of Community Facilities Districts established.

#### ***Goal 5: Invest in, Expand and Evaluate Economic Development Programs and Resources***

- ◆ Develop and articulate a more compelling case for regional collaboration and recognize that the ECoNA region will only be as strong as its weakest link - get to work on addressing the region's competitive disadvantages while building on its many assets.
- ◆ Improve collaboration and cooperation between and among the ECoNA organization and its member communities.
- ◆ Gather and disseminate best practices and case scenarios to educate both ECoNA and all of its partner communities and agencies- including those of the smaller jurisdictions - to significantly improve economic development capacity.
- ◆ Increase the annual budget of ECoNA so that the region can be more committed and serious about economic development; a one-person staff is extremely inadequate to effectively and successfully help grow the regional economy for the benefit of all communities:
  - » Achieve an annual cash operating budget of \$750,000 by FY 2025-26, with at least

- \$200,000 dedicated to a keenly-focused external marketing initiative to recruit targeted business and industry.
- » Develop performance metrics for ECoNA, monitor and evaluate performance at least twice annually with at least one 360-degree annual review by investors, partners and member communities.
  - » Support the attainment of professional national economic development certification of the ECoNA President/CEO and future staff and encourage the same for the heads of local government economic development agencies.
- ◆ Increase and invest in the economic development staff and resource capacity of the towns, cities and counties that are part of the ECoNA private-public partnership so that the entire economic development ecosystem of the ECoNA region is able to both improve and benefit all communities, residents and businesses across the region.
  - ◆ Significantly improve external outreach and communications about Northern Arizona as a place to live, learn and do business - do a better job telling its story:
    - » Obtain a minimum three-year commitment for sufficient funding of a highly targeted and consistent marketing campaign to retain existing business; recruit firms in the region's targeted sectors and attract more entrepreneurs to Northern Arizona.
    - » Acknowledge the economic importance of tourism to facilitate regional planning for coordination and collaboration to fully leverage the benefits of having business and leisure visitors in Northern Arizona.
  - ◆ Build a more effective economic development tool kit:
    - » Collate existing local data and plans for predictive economic analysis and develop a cohesive understanding of regional capacity and opportunities.
    - » Develop a business case for each of ECoNA's five targeted sectors; research and obtain databases of leading and growing firms in each of those targeted sectors and develop and execute a focused, consistent outreach program to decision-makers of these firms to introduce them to the advantages of locating / growing their business in Northern Arizona.
    - » Integrate and promote NAU's business-supporting disciplines, including astronomy, bioscience, manufacturing, forestry, health care and tourism, into the Northern Arizona business case.
  - ◆ Coordinate one-stop management for business leads, to facilitate seamless interface with communities, educational institutions, developers and government agencies.
  - ◆ Assist the region and its municipalities to improve the entire regional business climate and economic development competitiveness:
    - » Review existing municipal and county economic development ordinances and policies that impact economic vitality, highlight successful policies and promote additional policies to increase success in economic development.
    - » Facilitate data collection and dissemination to support planning for community and regional projects designed to upgrade community and regional economic well-being and competitiveness.
    - » Explore the creation and/or acquisition of Community Development Funds, Revitalization Districts, grant funding, and other financing mechanisms.
  - ◆ Advocate at the legislature on behalf of rural economic development, including infrastructure, education, health care, etc.
  - ◆ Better connect with and help build the region's small business and entrepreneurial ecosystem:


- » Develop mutually beneficial, reciprocal MOUs with local incubators, small and retail business associations and other organizations to maintain resource referral for small businesses and entrepreneurs.
- » Promote joint research with the small business/entrepreneurial organizations to identify gaps that need to be addressed in terms of resource and training needs.

### **Metrics/Milestones to Assess Progress**

- Increase in ECoNA’s budget and staffing.
- Development and buy-in of performance metrics for the organization.
- Quarterly performance reports and semi-annual performance reviews with 360-degree input from ECoNA’s investors and partners.
- Attainment of professional IEDC credentials for ECoNA and local government economic development directors.
- Timely completion and launch of an interactive site database.
- Number of new sites / development projects assisted.
- Development, execution and measurement of a targeted marketing campaign to retain and recruit business and entrepreneurs.
- Timely completion and targeted dissemination of the business case for locating in Northern Arizona.
- Timely preparation and submission of completed responses to ACA PIF requests.
- Timely preparation and submission of completed responses for site and location information to brokers and developers.
- Increased engagement with the entrepreneurial ecosystem in Northern Arizona as measured by a third party administered annual survey.
- Number of inquiries responded to.
- Number of leads assisted.
- Number of prospects assisted.
- Number of business expansions assisted.
- Number of new business locations assisted.
- Number and salaries of jobs retained as independently verified by existing employers assisted.
- Number and salaries of jobs recruited as independently verified by new business locations.
- Number of entrepreneurs assisted as independently verified by these firms.

### ***Goal 6: Strengthen Existing and Build New Regional, State and Federal Partnerships to Leverage Economic Development Opportunities***

- ◆ Increase of advocacy to the federal government for more funding for the USFS’s work with Northern Arizona, especially in flood mitigation and forestry management.
- ◆ Strengthen existing and build new partnerships with federal, state and nonprofit entities to obtain grant funding for Northern Arizona’s critical environmental protection needs.

- 
- ◆ Convene the region’s mayors, city/town councils and county supervisors from across the region to:
    - » Broaden policymakers’ perspectives from local to regional to national to global (similar to GAMA - Greater Arizona Mayor’s Association, and to
    - » Review regional policies that impact the region’s economic development competitiveness and ability to retain and attract talent, entrepreneurs and employers.
  - ◆ Collect necessary data to forecast growth across Northern Arizona for better planning.

#### **Metrics/Milestones to Assess Progress**

- Increased joint/collaborative efforts to obtain grant funding from the federal government.
- Increased grant funding for mission critical projects, including flood mitigation, forestry management, transportation infrastructure, broadband and water management.
- Increased Internet connections for residences and businesses, especially those areas that are lacking.
- Increased level of engagement, participation and commonly-shared priorities for economic development and sustainability.

## SECTION 10: TIMELINE FOR IMPLEMENTATION

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
<b>ECONA'S ECONOMIC DEVELOPMENT FRAMEWORK ACTION AGENDA</b>						
<b>Goal 1: Strengthen and Improve Locational Assets and Business Climate</b>						
a.	Continue to address both perceived as well as real business climate issues region-wide; the ECoNA region is generally perceived as being dominated by both public bodies and their policies as well as increasing numbers of residents who generally oppose change and population and business growth.	✓	✓	✓	✓	✓
b.	Twice annually, conduct a third-party administered confidential survey of all businesses in each jurisdiction to establish a measurable baseline of perceptions and concerns about operating a business in the ECoNA region; publish the results and spur action to improve the region's business climate.	✓	✓	✓	✓	✓
c.	Inventory and develop a portfolio of well-planned, shovel ready sites suitable for employers and their operations: <ul style="list-style-type: none"> <li>• Develop an interactive inventory of all vacant, developable and available land throughout ECoNA's region including land both adjacent and proximate to the Flagstaff Pulliam Airport, Northern Arizona Healthcare's new medical campus and other locations as well.</li> <li>• Work with the USFS to sell/trade land to free up land for other uses, including employment and housing.</li> <li>• Encourage Coconino County to turn over private lands over which it has control so that it can be utilized for housing.</li> </ul>	✓	✓	✓	✓	✓

ACTION	YR 1	YR 2	YR 3	YR 4	YR 5
<p>d. Continue to advocate for and advance economic development sites and projects where more near-term opportunities exist:</p> <ul style="list-style-type: none"> <li>• Winslow Innovation &amp; Logistics Hub; this partnership represents an opportunity to develop shovel ready sites in Winslow in collaboration with three major transportation and logistics companies.</li> <li>• Full build-out/development of the 1,200 acres west of Northern Arizona Healthcare’s new medical campus, which will have infrastructure brought to it; these 1,200 acres are ready to develop, and an additional 400 acres of state land would be development ready as well.</li> <li>• Bellemont/Camp Navajo area located along I-40 near Flagstaff and access to BNSF rail line. This area can expand its manufacturing cluster and attract transportation/logistics opportunities.</li> <li>• Camp Verde’s Verde Valley Industrial Park - now home to Frametec manufacturing facility and U.S. corporate headquarters.</li> </ul>	✓	✓	✓	✓	✓
<p>e. Strengthen and expand Northern Arizona’s targeted economic sectors, including:</p> <ul style="list-style-type: none"> <li>• The biomedical / biotech / healthcare sector, building upon both the concentration of these firms and institutions already located in Northern Arizona as well as Northern Arizona Healthcare’s new nearly \$1 billion medical campus.</li> <li>• Manufacturing / advanced manufacturing, capitalizing on transportation networks throughout the region and the existing base of talent.</li> <li>• Target and recruit supply and logistic support firms to service existing regional manufacturing needs, keep dollars in the region, create cost and time efficiencies for existing business.</li> <li>• Transportation, logistics, and distribution, leveraging interstate highway access, rail, and air transportation availability.</li> <li>• Professional, scientific, and business services to expand opportunities for Northern Arizona University (NAU) and Coconino Community College graduates, provide higher wage services opportunities, and maximize remote worker attraction.</li> <li>• Tourism and hospitality, expanding the region’s most prevalent base industry, capitalize on the region’s natural beauty, increase the potential pool of visitors, and increase visitor length of stay with more diverse offerings.</li> </ul>	✓	✓	✓	✓	✓

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
f.	Vigorous support and advance the retention and expansion of existing institutions and business, including: <ul style="list-style-type: none"> <li>• Lowell Observatory’s expansion.</li> <li>• Employers already present in Northern Arizona who need to grow their operations.</li> </ul>	✓	✓	✓	✓	✓
g.	Build and expand the entrepreneurial ecosystem in Northern Arizona: <ul style="list-style-type: none"> <li>• Increase the output of NACET and other entrepreneurship programs.</li> <li>• Support the expansion of existing incubation services for entrepreneurs to foster startups and leverage profitable niche businesses, with a focus in small communities that do not have “factory-sized” infrastructure and capacity.</li> <li>• Examine the potential of recruiting other well-established incubators, accelerators and mentorship organizations and resources to locate and operate in Northern Arizona.</li> </ul>		✓	✓	✓	✓
h.	Strengthen collaboration between the City of Flagstaff and Northern Arizona University (NAU) for planning and coordination for carbon neutral deadlines, future degree and training needs for the region and collaboration on infrastructure projects.	✓	✓	✓	✓	✓
i.	Strengthen Business to Business (B2B) networking and collaboration opportunities for recycling, workforce training, attracting supply and logistics partners, gaining critical mass and cost savings.	✓	✓	✓	✓	✓
j.	Continue to strengthen the region’s business and public sector relationships with both Canada and Mexico, both of which are key trading partners with Arizona: <ul style="list-style-type: none"> <li>• Survey existing firms and municipal/county governments to inventory their trade and other relations with Canada and Mexico.</li> <li>• Identify areas for increased visitor/tourism and B2B trade with Canadian and Mexican companies.</li> <li>• Utilize networks/contacts of existing Northern Arizona companies to host visiting delegations and identify/train local “ambassadors” to serve as leading hosts for these and other international delegations.</li> </ul>			✓	✓	✓

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
<b>Goal 2: Invest in and Build Quality of Life / Quality of Place Necessities and Amenities</b>						
a.	Continue to plan for and strongly encourage the development of a broad range of housing options to accommodate all generations and with a particular focus on retaining and recruiting NAU graduates as well as young workers.	✓	✓	✓	✓	✓
b.	Focus on the development of affordable, attainable housing, especially at lower-income and workforce level wages, targeting households with incomes ranging from 40%-120% of the area's median income.	✓	✓	✓	✓	✓
c.	Acknowledge, accommodate and support special needs related to the commuter workforce, including travel costs, time and logistics.	✓	✓	✓	✓	✓
d.	Support the expansion and enhancement of arts and cultural venues and offerings within the communities.	✓	✓	✓	✓	✓
e.	Support programming to address social determinants of health, including access to food, housing, health care, physical recreation.	✓	✓	✓	✓	✓
f.	Increase health care services, including specialized medicine and mental health providers.	✓	✓	✓	✓	✓
g.	Decrease rates of crime in high crime areas.	✓	✓	✓	✓	✓



ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
<b>Goal 3: Develop and Grow the Region’s Workforce through Collaboration, Education and Training</b>						
a.	<p>Elevate and improve collaboration between the region’s public, private and education sectors to:</p> <ul style="list-style-type: none"> <li>• Strengthen and improve the alignment of public workforce and corporate and business partners; improve access, service, create benchmarks and institute best practices.</li> <li>• Develop better job training pathways and placement processes between employers and post-secondary education institutions.</li> <li>• Coordinate a better alignment between forestry educational programs and forest industry workforce needs.</li> <li>• Increase coordination across jurisdictions, including tribes, to utilize federal workforce development funds. Funds are spread thinly across multiple organizations; improved coordination could lever the dollars for maximum benefit.</li> <li>• Strengthen relationships between Northern Arizona University (NAU) and the business community for mutual benefit.</li> </ul>	✓	✓	✓	✓	✓
b.	<p>Continue to recruit and support the creation of well-established, respected trade schools that provide job-oriented training for skilled trades that are needed by existing business and industry:</p> <ul style="list-style-type: none"> <li>• Establish a “mobile trade school” that takes training programs to where they are needed, or to rural areas without education facilities, including small rural communities, Arizona State Prison in Winslow, Yavapai Prison and tribal communities.</li> <li>• Build, support and expand the number/availability of credentialed and certificate training programs at Community Colleges and trade schools, e.g., law enforcement, engineering, machinery, controls, electricians, pipe fittings, welding.</li> </ul>	✓	✓	✓	✓	✓



ACTION	YR 1	YR 2	YR 3	YR 4	YR 5
<p>Prepare, retain and grow the talent pipeline in our “own backyard” by:</p> <ul style="list-style-type: none"> <li>• Developing programs to stay connected with college graduates from NAU and Coconino Community College and keep them in the community.</li> <li>• Connecting with high school students to keep them informed and knowledgeable about career and college opportunities in Northern Arizona.</li> <li>• Work with appropriate partners to identify and establish support systems to prepare, train and integrate immigrant labor into the regional workforce.</li> <li>• Increase the number of youth apprenticeship (16+) opportunities in targeted economic sectors experiencing positive job growth that offer great career opportunities.</li> <li>• Expand industry collaborations with K-12 and community college to train/educate youth.</li> <li>• Increase the volume of paid internships for high school and college students in both the private and public sectors.</li> <li>• Support and expand trade education for tribal communities and provide scholarships to encourage education at any postsecondary level.</li> <li>• Improve regional cooperation between geographically accessible communities, including St. John’s, Winslow, Holbrook and the region’s Native American communities.</li> <li>• Establish incentive programs for medical personnel to train and stay in Northern Arizona, e.g., waive tuition for graduates who agree to practice in Northern Arizona for a defined period of time.</li> <li>• Identify and promote opportunities to coordinate with the military base for training purposes to put training facilities onto the military base, and to prepare military personnel for employment in the region upon their exit from service.</li> <li>• Capitalize on Northern Arizona Healthcare’s new medical center expansion in Flagstaff, which will include a nursing training and simulation center, to expand the healthcare talent base.</li> </ul>	✓	✓	✓	✓	✓

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
d.	Examine and pursue the potential of becoming a training location for airline pilots; there are current pilot, crew and plane shortages; the region has the area to do this specialized training; Winslow has airport capacity for commercial airport (Winslow Lindbergh Regional Airport).		✓	✓	✓	✓
<b>Goal 4: Expand Investment in and Completion of Infrastructure and Growth Capacity</b>						
a.	Expand the public transit system and network to provide for more access to places of work and regional amenities, while reducing automobile commutes.	✓	✓	✓	✓	✓
b.	Expand the local transportation system and install bus stops at major employer sites.	✓	✓	✓	✓	✓
c.	Develop the John Wesley Powell Corridor.	✓	✓	✓	✓	✓
d.	Widen I-17.	✓	✓	✓	✓	✓
e.	Increase the capacity of Flagstaff Pulliam Airport, e.g., attract and retain more commercial daily flights.	✓	✓	✓	✓	✓
f.	Expand broadband throughout the entire region, including the most underserved communities.	✓	✓	✓	✓	✓
g.	Invest in additional rail infrastructure, through a multijurisdictional partnership to free rail adjacent state or federal lands; opportunities for importing lumber, plastics, fuel and exporting new manufacturing products.	✓	✓	✓	✓	✓
h.	Continue to actively pursue and win federal and state grant funding that currently is available for major infrastructure projects; the region needs to pursue these grants to fund essential infrastructure.	✓	✓	✓	✓	✓
i.	Continue management of the region's water portfolio, including increasing potable reuse.	✓	✓	✓	✓	✓
j.	Support the repair of the levee in Winslow (critical cross-over for BNSF Railroad) and for the U.S. Army Corps of Engineers to get this work done.	✓	✓	✓	✓	✓

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
k.	Capitalize on the current availability of federal grants for infrastructure, particularly for multijurisdictional projects.	✓	✓	✓	✓	✓
l.	Examine and advance opportunities to replace the Navajo Nation’s coal generating station with wind and solar power; utilize the County’s Utility Scale Renewable Energy Ordinance as a potential incentive.	✓	✓	✓	✓	✓
m.	Complete the expansion of sewer infrastructure to Camp Verde Opportunity Zone to create additional development opportunities.	✓	✓	✓	✓	✓
n.	Utilize existing economic development tools such as Community Facilities Districts (CFD) and Government Property Lease Excise Tax (GPLET), to make exaction more palatable to private industry.	✓	✓	✓	✓	✓

**Goal 5: Invest in, Expand and Evaluate Economic Development Programs and Resources**

a.	Develop and articulate a more compelling case for regional collaboration and recognize that the ECoNA region will only be as strong as its weakest link - get to work on addressing the region’s competitive disadvantages while building on its many assets.	✓	✓	✓	✓	✓
b.	Improve collaboration and cooperation between and among the ECoNA organization and its member communities.	✓	✓	✓	✓	✓
c.	Gather and disseminate best practices and case scenarios to educate both ECoNA and all of its partner communities and agencies- including those of the smaller jurisdictions - to significantly improve economic development capacity.	✓	✓	✓	✓	✓

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
d.	<p>Increase the annual budget of ECoNA so that the region can be more committed and serious about economic development; a one-person staff is extremely inadequate to effectively and successfully help grow the regional economy for the benefit of all communities:</p> <ul style="list-style-type: none"> <li>• Achieve an annual cash operating budget of \$750,000 by FY 2025-26, with at least \$200,000 dedicated to a keenly-focused external marketing initiative to recruit targeted business and industry.</li> <li>• Develop performance metrics for ECoNA, monitor and evaluate performance at least twice annually with at least one 360-degree annual review by investors, partners and member communities.</li> <li>• Support the attainment of professional national economic development certification of the ECoNA President/CEO and future staff and encourage the same for the heads of local government economic development agencies.</li> </ul>	✓	✓	✓		
e.	<p>Increase and invest in the economic development staff and resource capacity of the towns, cities and counties that are part of the ECoNA private-public partnership so that the entire economic development ecosystem of the ECoNA region is able to both improve and benefit all communities, residents and businesses across the region.</p>	✓	✓	✓	✓	✓
f.	<p>Significantly improve external outreach and communications about Northern Arizona as a place to live, learn and do business - do a better job telling its story:</p> <ul style="list-style-type: none"> <li>• Obtain a minimum three-year commitment for sufficient funding of a highly targeted and consistent marketing campaign to retain existing business; recruit firms in the region’s targeted sectors and attract more entrepreneurs to Northern Arizona.</li> <li>• Acknowledge the economic importance of tourism to facilitate regional planning for coordination and collaboration to fully leverage the benefits of having business and leisure visitors in Northern Arizona</li> </ul>	✓	✓	✓	✓	✓

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
g.	<p>Build a more effective economic development tool kit:</p> <ul style="list-style-type: none"> <li>• Collate existing local data and plans for predictive economic analysis and develop a cohesive understanding of regional capacity and opportunities.</li> <li>• Develop a business case for each of ECoNA's five targeted sectors; research and obtain databases of leading and growing firms in each of those targeted sectors and develop and execute a focused, consistent outreach program to decision-makers of these firms to introduce them to the advantages of locating / growing their business in Northern Arizona.</li> <li>• Integrate and promote NAU's business-supporting disciplines, including astronomy, bioscience, manufacturing, forestry, health care and tourism, into the Northern Arizona business case.</li> </ul>		✓	✓	✓	✓
h.	Coordinate one-stop management for business leads, to facilitate seamless interface with communities, educational institutions, developers and government agencies.	✓	✓	✓	✓	✓
i.	<p>Assist the region and its municipalities to improve the entire regional business climate and economic development competitiveness:</p> <ul style="list-style-type: none"> <li>• Review existing municipal and county economic development ordinances and policies that impact economic vitality, highlight successful policies and promote additional policies to increase success in economic development.</li> <li>• Facilitate data collection and dissemination to support planning for community and regional projects designed to upgrade community and regional economic well-being and competitiveness.</li> <li>• Explore the creation and/or acquisition of Community Development Funds, Revitalization Districts, grant funding, and other financing mechanisms.</li> </ul>	✓	✓	✓	✓	✓
j.	Advocate at the legislature on behalf of rural economic development, including infrastructure, education, health care, etc.	✓	✓	✓	✓	✓

ACTION		YR 1	YR 2	YR 3	YR 4	YR 5
k.	<p>Better connect with and help build the region’s small business and entrepreneurial ecosystem:</p> <ul style="list-style-type: none"> <li>• Develop mutually beneficial, reciprocal MOUs with local incubators, small and retail business associations and other organizations to maintain resource referral for small businesses and entrepreneurs.</li> <li>• Promote joint research with the small business/ entrepreneurial organizations to identify gaps that need to be addressed in terms of resource and training needs.</li> </ul>	✓	✓	✓	✓	✓

**Goal 6: Invest, Improve and Build Community and Quality of Life Necessities and Amenities**

a.	Increase of advocacy to the federal government for more funding for the USFS’s work with Northern Arizona, especially in flood mitigation and forestry management.	✓	✓	✓	✓	✓
b.	Strengthen existing and build new partnerships with federal, state and nonprofit entities to obtain grant funding for Northern Arizona’s critical environmental protection needs.	✓	✓	✓	✓	✓
c.	<p>Convene the region’s mayors, city/town councils and county supervisors from across the region to:</p> <ul style="list-style-type: none"> <li>• Broaden these policymakers’ perspectives from local to regional to national to global (similar to GAMA - Greater Arizona Mayor’s Association, and to</li> <li>• Review regional policies that impact the region’s economic development competitiveness and ability to retain and attract talent, entrepreneurs and employers.</li> </ul>	✓	✓	✓	✓	✓
d.	Collect necessary data to forecast growth across Northern Arizona for better planning.	✓	✓	✓	✓	✓



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