***BrandPrint Project* for**

Grand Junction / Mesa County

Competitive Location Assessment Report

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February & May, 2015

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Table of Contents

I. **Competitive Location Assessment Process** 1

What is the objective of a Competitive Location Assessment as part of the Brand Print Process? 1

What are the key takeaways from this assessment and recommendations? 1

What is the Site Selection Process? 1

How is Competitive Location Assessment Process Conducted? 2

How do economic market drivers play into creating acompetitive location and economically healthy community? 3

II. **Findings & Tactical Actions** 4

Based on Findings – five recommended over-arching "areas of focus" 4

High-level Economic Development Assets – Challenges - Opportunities 5

Location Assessment Factor Findings & Tactical Recommendations 8

III. **Tactical Targeting** 31

IV. **Place Development** 37

V. **Research** 43

About the Project Team *63*

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I. Competitive Location Assessment Process

What is the objective of the Competitive Location Assessment as part of the BrandPrint Project?

The Competitive Location Assessment discovers who you are by understanding how you rank relative to competitor communities and how outside companies perceive you. Building on this understanding, the Competitive Location Assessment offers ways to *better-the-game* of your business attraction program.

What are the key takeaways from this assessment and recommendations?

1. Provide an outside perspective of how the community would rank in a site selector evaluation – *would you make the short list?*
2. Provide insights on how not to get eliminated in a location search.
3. Help to understand economic market drivers and opportunities within those drivers.
4. Help to increase lead conversion rates by focusing on the *value proposition* for a business to locate in your community.
5. Present ideas to better position the community for economic growth.

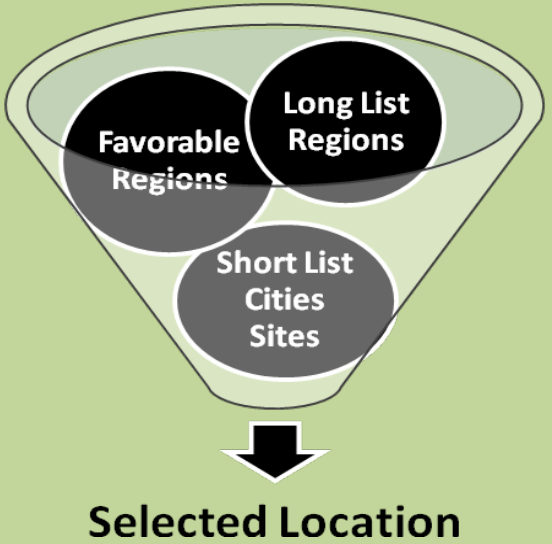
What is the Site Selection Process?

The Competitive Location Assessment is similar to a site consultant's typical client project where the consultant is searching for the best location. Site Selection Consultants are trained to make quick assessments of communities often driven by clients' aggressive project timelines.

The site selection process is about **elimination** rather than "site selection" i.e., *the elimination funnel*. Consultants "search" for reasons to eliminate a community so they can move quickly in identifying a **short list** of communities that can best meet the client's needs.

At 30,000 feet, most regions look roughly the same…

Site Search (Elimination Funnel)



How is a Competitive Location Assessment Conducted?

The basis for the Competitive Location Assessment is similar to a site consultant's typical client project. A **"mock"** project, location search for an industry/business, is used to simulate a real site location evaluation.

The evaluation is a combination of desktop research, data gathering from local websites, review of studies and plans, phone and personal interviews, and an on-site investigation using the "mock project" requirements as a guide for evaluating the community.

Site consultants follow high standards on behalf of their clients when they draw on economic development organizations and local governments to gather needed community and property information. The mock project portion of the Competitive Location Assessment follows these same high standards and thus is a realistic representation of the process.

Ten (10) Location Factor categories are used in the mock project (see sidebar).Each category includes variables that measure a community's strengths and weaknesses. Collectively the measures determine if the region/community is strong enough to make the project short-list.

For this assignment **Don Schjeldahl**, a global site selection consultant and **Audrey Taylor**, an economic development strategy expert conducted the assessment. Site Location Consultants are trained to make quick assessments of communities because of their clients' timelines. It is not uncommon for a site consultant to make an initial assessment after a four (4) hour visit. Partnering the assessment with an economic development strategist provides a unique opportunity for identifying strengths and weaknesses, and ultimately to identify game changing solutions.

Notes to the assessment:

- In a real site search project a community may never make it to past Factor 3, Mitigated Risk. The first three factors are often investigated by the Site Selector or Corporate Executive without every coming to the community or looking at the community website. The first three factors relate to macro factors that guide investment strategy including access to raw materials, customer markets and state tax policy. .
- Priority ranking of factors depends on the particular needs of any given industry and the proposed operation. For the Corporate Location Assessment mock project, the order of factors is typical; however, workforce may rank higher given the tight labor market. Owner-operators, smaller/mid-size businesses are more often attracted by the Quality of Place and lifestyle.

Ten Factors that Influence the Location Decision

1. **Location – Market Access**
2. **Transportation**
3. **Mitigated Risk**
4. **Real Estate Portfolio**
5. **Utilities / Infrastructure**
6. **Workforce**
7. **Business Environment**
8. **Business Costs & Resources**
9. **Organizational Effectiveness**
10. **Quality of Place**

How do economic market drivers play into creating a competitive location and economically healthy community?

Local economies are complex. Different businesses and service providers have different economic impacts as well as different impacts on quality of life.

Segmenting the economy by ***three main economic market drivers*** helps to understand:

1) Assets and opportunities by market driver, and

2) Organization of work efforts to enhance the retention or growth of the driver.

Traded Sector – are those businesses providing goods and services outside of the region, typically part of an industry supply chain either as a producer or a supplier. These businesses provide the highest economic multiplier effect on a region because of the economic impact effect.

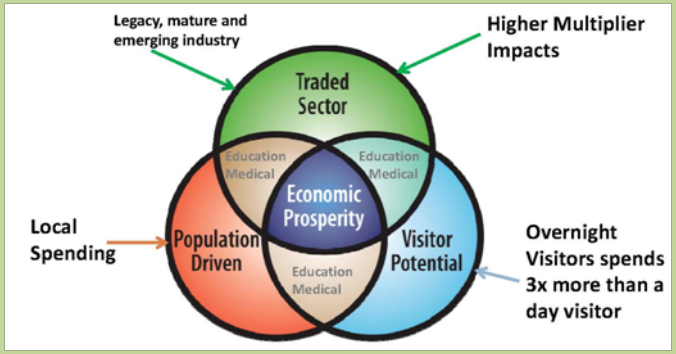
Visitor Potential Businesses – for many areas visitor spending (tourism) can be quite substantial in boosting the local economy and supporting local businesses. The multiplier effect can be increased if visitors stay longer and buy goods and services locally during their visit.

Population Driven Businesses – those businesses that provide goods and services to the local residents, such as, medical, grocery stores, cleaners, etc. The economic multiplier effect is much smaller for population serving businesses but are key to the economy.

There are businesses that operate and/or serve multiple market driver segments. There are Legacy as well as Emerging sectors within the Traded Sector. Government, education and health serve all market segments and are large contributors to the economy.

Those communities that are competitive for new business locations and development have common characteristics around their economic development assets.

Economic Drivers



Characteristics

- ✓ Diverse and healthy economic base
- ✓ Portfolio of "***ready***" building & sites
- ✓ Appropriate utility infrastructure
- ✓ Labor force ready to work, strong training resources
- ✓ Streamlined permitting process
- ✓ Strong support for existing industry
- ✓ Professional, collaborative economic development environment

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II. Findings & Tactical Actions

Based on Findings – five recommended over-arching "areas of focus"

Grand Junction/Mesa County has many assets, resources, opportunities and **doers** to be very successful in creating a healthy economy.

The Location Assessment included in this report provides feed-back to Mesa County Team, from a *traded-sector industry location search* perspective, on how well these assets are being deployed to achieve your goal of a diversified and healthy community.

During the assessment the Consultant Team identified areas where the cities and region can improve competitiveness to enhance business attraction marketing, lead generation and lead conversion.

Through data research, field investigation, and interviews the Consultant Team identified five "core areas" of focus for improving competitiveness. Success will require that all entities involved in business development[1] come together to get results (see side graph).

These are the "overall" areas of focus, location factor recommendations are provided in Location Factor Findings and Tactical Recommendations.

1	**Product Improvement**
	Continue to improve product – develop infrastructure (e.g. broadband, roads), available buildings and ready sites, physical connectivity between employment centers (e.g. downtowns, CMU and downtown), community beautification.
2	**Packaging**
	Create a marketing suite that sells a *value proposition* to businesses that align with those things that are particularly strong in Mesa County - the characteristics that now serve companies that are local icons.
3	**Operational Effectiveness**
	Create a "shared-value" compact, community leaders coming together to develop a broader-term strategy for success: ▪ Work across sectors ▪ Shared vision, shared responsibility and shared praise (team) ▪ Most important actions to take ▪ Align market drivers with resources ▪ Brand consistency ▪ Sustained leadership and actions
4	**Tactical Targeting**
	Stop random acts of marketing, work together on strategic targeting based on value proposition and business characteristics.
5	**Brand Identity**
	Create a consistent brand identity and messaging platform.

[1] Business Attraction, Retention, Expansion and Creation

High-level Economic Development Assets – Challenges – Opportunities

A

- Good portfolio of manufacturing companies
- Major east/west highway serving the region – I-70
- Good commercial air service
- Land resources that will support development needs long into the future
- Incentives – willingness to engage to make things happen
- Ample utility resources
- Modest operating costs
- Higher education model CMU/WCCC – CMU growth - K-12 Education
- Strong regional medical center
- A complimentary tool box of business resources – employment & training, small business assistance, financing, mentoring, maker space, counseling, Business Incubator Program,
- Solid anchors for diversification, e.g. sports, downtown, niche markets
- Smaller communities bookend Grand Junction and have own niche for residential and tourists
- Entrepreneurial spirit in cities and county

C

- Real Estate
  - Unclear on true readiness of sites - costs
  - Limited "ready" industrial buildings
- Transportation
  - Trucking costs are high and service worse compared to many communities
  - Air service – maintaining and expanding service
- Infrastructure
  - Broadband speed/cost structure is unfavorable
- Labor
  - Better documentation of labor shed and assets
  - Availability of skilled labor not well understood
- Random Acts of Marketing
  - Lack of coordination on messaging and branding
  - Poor packaging of area's resources and strengths
- For outsiders it is confusing who does what in the economic development arena (e.g. no single "go-to" organization or websites for economic development answers)

O

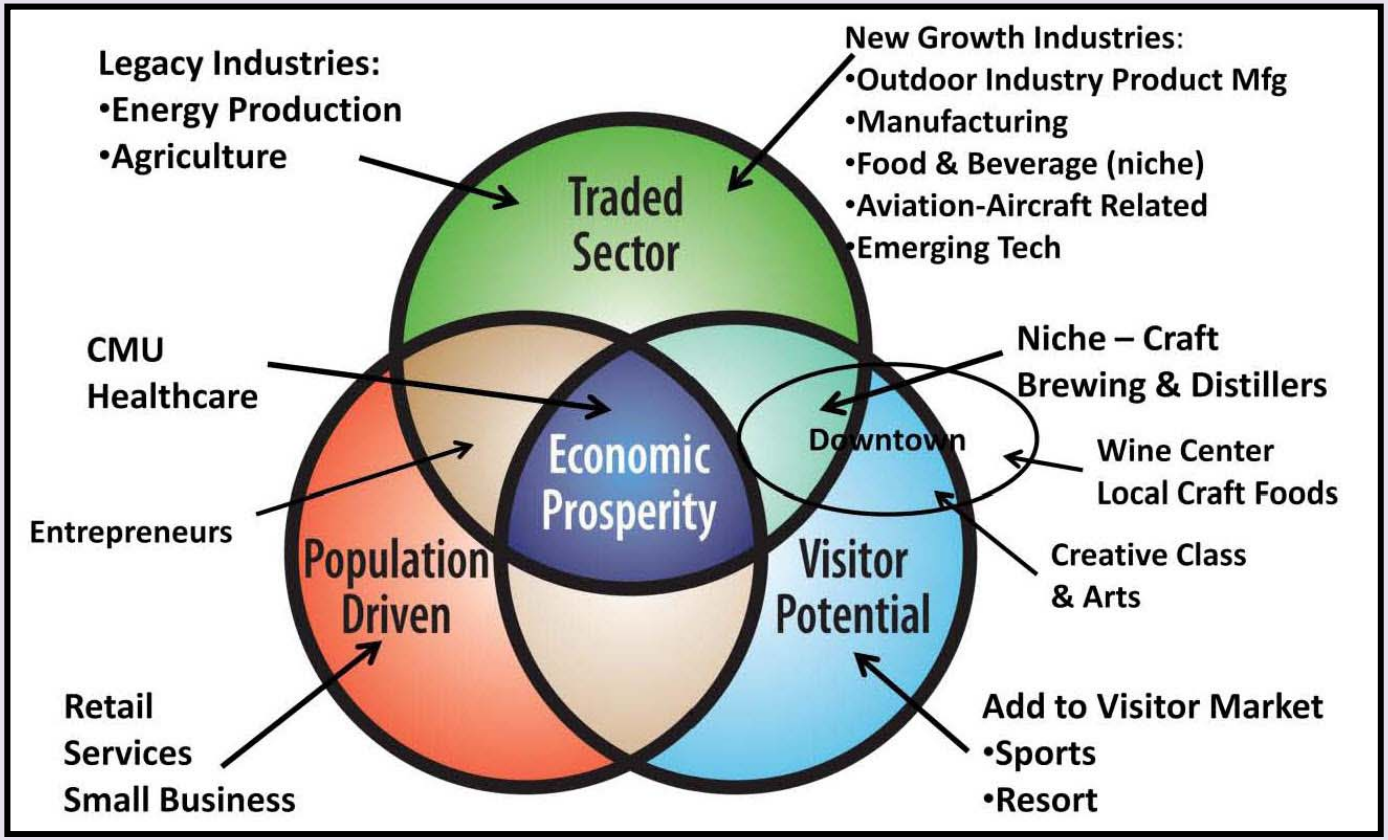
There are many areas of opportunity to leverage time, talent and tools around economic drivers/markets that will diversify the economy (Economic Prosperity graphic).

Examples include:

- Grand Junction's position and recognition in the sports arena, the successful JUCO. Expanding that market position to other sports will grow the Visitor Market with one outcome being increased visitors during "visitor down times." This would help Fruita and Palisade to draw more visitors which give visitors a reason to stay longer (organization is already in place around sporting events so expanding should be relatively easy).
- Palisade's proposed Sports Shooting Complex adds to the region's outdoor and sporting brand.
- Grand Junction's River District and downtown – if readied and positioned, both are excellent opportunities for new business expansion and a unique branding message.
- Fruita's downtown offers an opportunity to create a globally recognized "destination" by leveraging their already well-known identity as a biking Mecca and "weird" community.
- Grand Junction has had a successful visitor campaign with

– wine is very unique to Mesa County, particularly in Colorado. The ability to tour wineries and taste local product is one of the wonderful local experiences available to visitors. It is part of a growing mix for what visitors can enjoy on a short or long stay. One of Mesa County/Grand Junction's most unique and rare assets (along with wine) is the outdoor experience which spans all seasons (visitgrandjunction.com).As the brand identity is being considered, it may be the right time to consider expanding from "wine country" to the broader "outdoor destination" that the region is becoming known for.

- Strategically the economic development entities and the local government jurisdictions would be well served if they could align work efforts around opportunities and challenges (or needs) in each of the three economic market drivers as noted below.
- Create action plans around each market driver that best align and utilize the expertise and resources of the various economic development entities.
- Determine how local assets fit/align with the larger picture and then focus on how to enhance these assets so they become stronger economic drivers for the region.



Location Assessment Factor Findings & Tactical Recommendations

The Competitive Location Assessment is built around 10 Location Factors).

The Consultant Team developed the Location Assessment through observations and findings – from field investigation, research and follow-up during the period February – March 2015.The assessment provides a vehicle for determining the following about Mesa County:

1. How does Mesa County align with variables within each location factor?
2. What are the tactical actions that could help to improve Mesa County's competitiveness?

The intent of this exercise is to provide an un-biased evaluation of how you stand as a location for new and expanding businesses.

This report highlights areas that need improvement – the regional leadership generally understands overalls strengths. This is a deeper dive to determine regional readiness for business locations.

Factors studied include hard physical infrastructure as well as soft factors like organizational and operational collaboration in your economic development programs.

Note: Like any study of human systems, this report reflects the Consulting Team's observations of the community and is likely to include incomplete information and erroneous impressions. This is also typical of a site selector or corporate manager investigation of a community.

For a community to remain in the hunt for a corporate project it is essential to present clearly, concisely, and accurately the community's value proposition. In other words, this report may not be a fair appraisal of your community but it's the one we took away from the exercise.

For observations that are erroneous or simply incomplete, easy fixes are likely to exist to avoid this from happening in the future. The key - *competitive communities have the requested information available and organized to address a site consultant's and/or company's requests quickly.*

1. **Location – Market Access**
2. **Transportation**
3. **Mitigated Risk**
4. **Real Estate Portfolio**
5. **Utilities / Infrastructure**
6. **Workforce**
7. **Business Environment**
8. **Business Costs & Resources**
9. **Organizational Effectiveness**
10. **Quality of Place**

Market Access

- If Grand Junction/Mesa County is to serve as a traditional distribution point – at the center of a consumer market (individuals or industrial customers) the region's options are limited. Maximum distance from a location/logistics standpoint would be one way/one day drive time (roughly illustrated in map below).The largest markets in this service area are likely more efficiently with distribution points located well outside western Colorado.
- Global distribution/logistics is certainly possible if the product or service has a unique competitive advantage. For example, Reynolds Polymer Technology, Leitner-Poma, and West Star Aviation all fall under this umbrella.
- Interviews with local businesses serving national and global markets indicate their decision to locate in Mesa County was based on "choosing the area they wanted to live"; they were much smaller when they located and have grown their companies to their current size over time.

Location Factor:
Market Access

What is being looked at…

- ✓ Location to major markets - domestic and foreign.
- ✓ Proximity to suppliers and raw materials.

Transportation

- Located at the junction of US 50 and I-70. Both major transportation corridors; US-50 east-west coast to coast. I-70 connects with north/south I-15 to west and I-25 to east. Denver: 265 miles, 4 hour drive, Salt Lake City: 287 miles, 4.5 hour drive, Provo (PVU): 235 miles, 3.75 hour drive.
- Grand Junction Regional Airport: 5 miles from city center. Served by four airlines (Allegiant, US Air/American, Delta, and United). Nonstop flights to DEN, SLC, PHX, LAS, DFW, HOU.
- Westside Beltway planned. Improvements to 25 Road from I-70 B/Highway 6 and 50 to F 1/2 Road, F 1/2 Road to 24 Road and 24 Road from Patterson Road to the interchange at I-70 in the Grand Junction.
- Rail provided by Union Pacific. Closest intermodal facility Denver.
- Most industrial sites close to highway/interstate. For most part industrial ingress/egress good except Fruita Industrial Park, stopping distance after cross rail tracks too short.

Tactical Recommendations

1) Create maps that show the location of Mesa County relative to the United States, Colorado, and western Colorado. Highlight transportation assets including highways, airports, and rail lines. Use maps in proposals and on websites to help prospective businesses orient to region and markets.
2) Continue efforts to maintain and increases affordable commercial flights to GJT. The airport is a key asset, given distances from major markets, for attracting companies to the region.
3) Establish a database of transportation companies, small parcel/cargo carriers, freight forwarders, and others providing transportation services. Include information from the database in proposals and on websites. Work with local companies to leverage buying power for improving transportation service and lower costs.

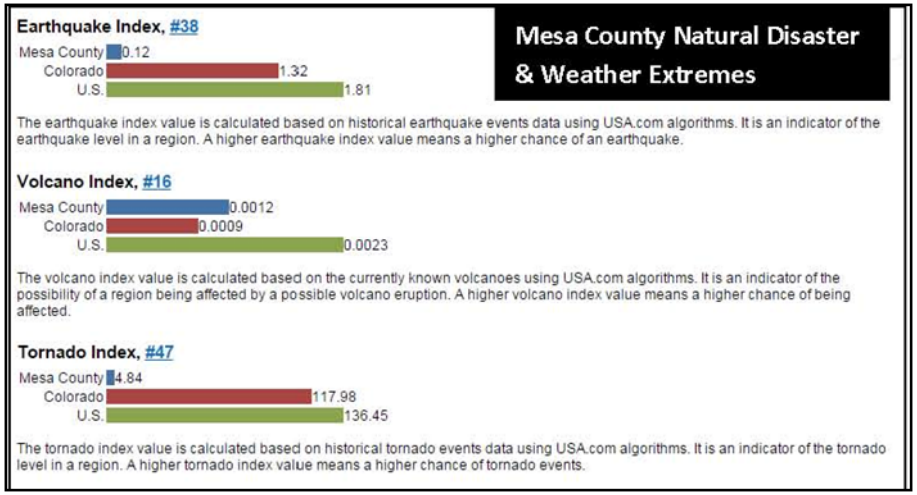
Location Factor: Transportation

What is being looked at…

- ✓ A highway and arterial road network that supports the efficient movement of people and goods.
- ✓ Availability of multi-modal transportation system.
- ✓ Airport with scheduled service and cargo capabilities.
- ✓ Distance to major hubs.
- ✓ Highway- interstate access.
- ✓ Highway distance from industrial sites.
- ✓ Inbound and outbound logistics.
- ✓ Rail access – frequency of service and feasibilty of rail spur.
- ✓ Carriers – LTL, small parcel.
- ✓ Port facilities – proximity.
- ✓ A public transportation system that efficiently provides access to job sites and other community facilities.

Mitigated Risk

- Mesa County is relatively free of serious natural hazards (see graph below).Snow, wind, and high temperatures are perhaps potential hazards that outsiders may associate with the region.
- GJT reports dense fogs (on rare occasions) that can cause air flight delays.
- The legalizing of marijuana in Colorado could be perceived as a risk. The jury is still out as to how legalization is impacting business operations. Historically the use of drugs is contrary to most business operation policies, particularly businesses with large and sophisticated equipment.



Tactical Recommendations

- This could be a location question, good to document frequency of weather events.
- Document dense fog days and what business travelers do in response.
- Be prepared to discuss the latest findings on marijuana use in Colorado and local policies with regard to sale and use.

Location Factor:
Mitigated Risk

What is being looked at…

Perceived or real:

- ✓ Natural hazards/disasters including earthquakes, tornadoes, hurricanes, major weather delays that close transportation for extended periods.
- ✓ Man made hazards, such as, illegal drug use, legalized marijuana, and toxic waste.
- ✓ Conflicts over land rights, particularly involving government lands.

Real Estate Portfolio (Sites & Buildings)

- Grand Junction/Mesa County have land resources that will support development needs long into the future.
- Twelve parks were identified through search of the property database at GJEP. Overall description of the parks, e.g. whether business, office, or industrial; tenants; total size; location; amenities, or level of infrastructure service missing. Industrial parks are all on or near I-70, Hwy(s) 6 or 50. Four parks are within two miles of Grand Junction Regional Airport.
- There are several resources for identifying industrial, office and commercial lands within the region. Obvious duplication and suspected unique listings lead to confusion for the user. There should be just one authoritative website. Current sources include:
  - GJEP: Searchable property database, http://gjep.org/expand-relocate/real-estate/
  - Grand Junction: Has excellent property database with good info and GIS mapping capabilities, gjcity.org/EconDev/ILIA.aspx., also links to GJEP's property database.
  - IDI: Grant Junction's website (Site Selection page) also has link to Industrial Developments, Inc. The IDI home page states that it is a sister company of the Grand Junction Chamber.IDI properties marketed are: Air Tech Park and Bookcliff Technology Park. The only information given on the properties are site maps from 2005 and 2007 respectively.
- The Whitewater area sites, including both public and private offerings, provide a good example of the inadequacy of the current system for bringing property to the attention of potential users.

  Whitewater properties appear to be missing from online databases and are not generally recognized in the market. Consultant team had good follow-up with county staff on these opportunity sites, staff immediately prepared GIS maps. Even with this, the evaluation of Whitewater properties still requires further investigation on zoning, permitted uses, sizes, property ownership and costs.
- Database search of GJEP's database returned 41 industrial/warehouse buildings ranging from 1,000 to 144,900 SF; and 25 retail, commercial buildings ranging from 1200 to 50,000

Location Factor: Real Estate Portfolio (Sites & Buildings)

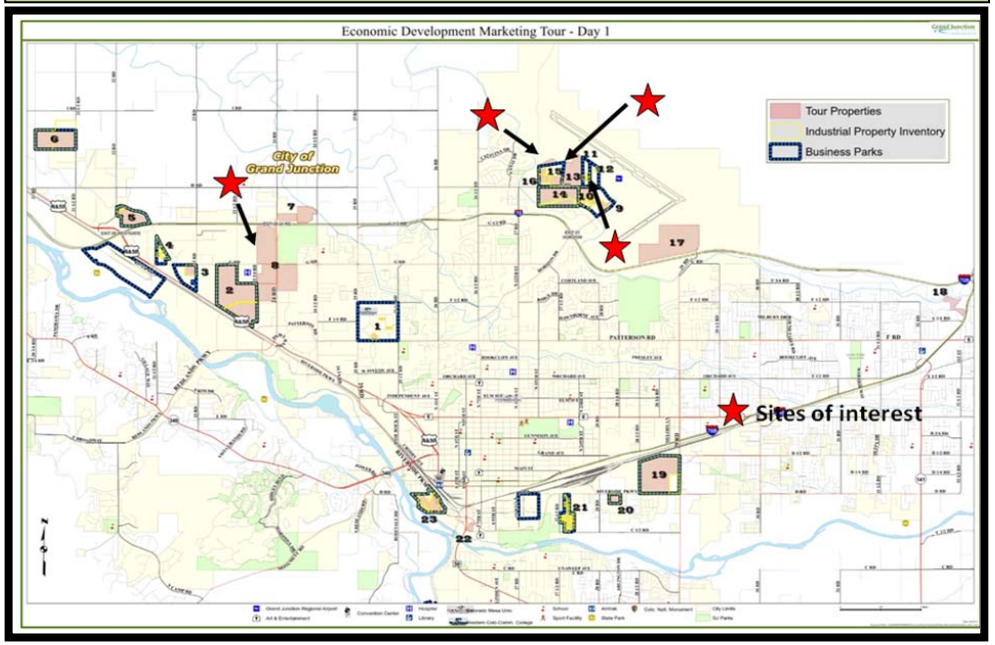
What is being looked at…

- ✓ Ready-to-go sites (1 to 100+ acres) served with all utilities, highway access, proper zoning, and controls in place which will prevent undesired development.
- ✓ Buildings – Industrial (10,000, 50,000, 100,000 sq.ft.), spec or plans for buildings (virtual buildings), incubator, maker and research space. Diverse Class A, B with adequate parking.
- ✓ Business/Industrial Park settings, maps or aerials highlighting existing companies in parks and transportation (including public).
- ✓ Available at reasonable lease rate or purchase price.
- ✓ Up-to-date inventory to understand what are priority sites and buildings that are "shovel-ready" – is the inventory screened to align with targets.
- ✓ Maps to understand the availability, locations and settings of priority sites.
- ✓ Detailed site and building sheets – utility served, egress-ingress, suitable soils, drainage, zoning, free of contamination.
- ✓ Detailed maps of proposed site / buildings (footprint).

SF. No buildings were toured for mock project .Appears to be limited ready-to-go industrial buildings.

- Packaging, by those involved in economic development, of building and site information is inconsistent. Uniform standards should be developed and followed.
- The Business Incubator Center (BIC) offers space for lease (commercial kitchen, light mfg, office). 35,000 SF mixed tenant space.
- Excellent resources and staff at City/County providing "best practices" GIS Mapping.
- Incentives - IDI property holdings, City-County owned property, Enterprise Zone
- Community does not have sites that are certified shovel-ready. This puts the region at a competitive disadvantage relative to some other communities.
- After touring more than 20 properties, readiness was still unclear. Four sites aligned with the mock project were identified as potentials in Grand Junction:
    - Printers Court-7 parcels,
    - H Road/Sacramento-12 acres,
    - Horizon Drive-3.2 acres,
    - CFP Industrial-174 acres.
    - No buildings.
- Toured Whitewater sites as well as Fruita Greenway Industrial Park.

From Field Investigation for mock project five potential sites of interest identified, however, site readiness is unclear



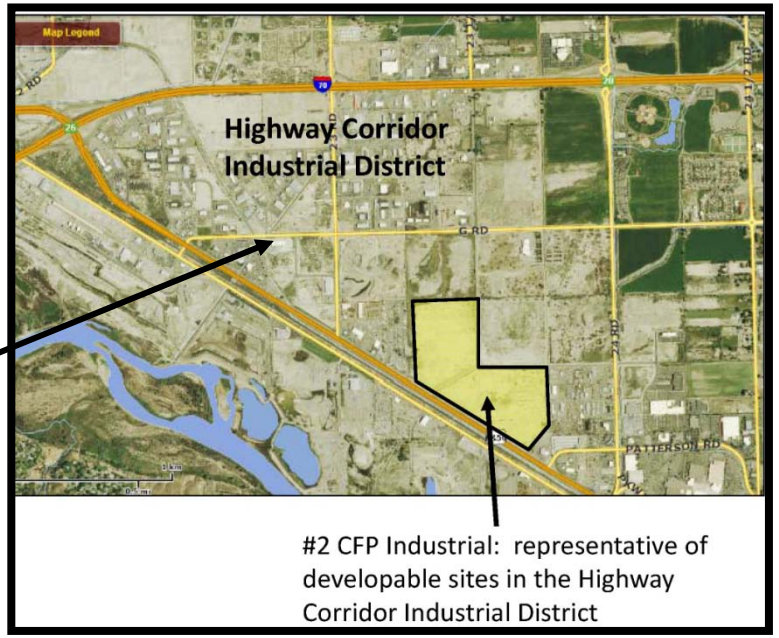
Note: During follow-up with County staff on the Whitewater properties, the Team was alerted to some county-owned properties that could be potential "shovel-ready" sites in the future.

The sites are not ready yet, there is additional work being done to bring these sites to readiness e.g. utilities, zoning, access roads. Once ready and documented these sites will offer additional opportunity sites which if owned by the County could potential be incentivized to locate businesses.

Highway Corridor Industrial District

Strength:
Utility served with good access to highways.

Weakness:
Heavy industrial environment away from workforce and amenities. No apparent development plan for property or surrounding area.
Question – is pricing here competitive with other locations in Mesa County and with other communities?



#2 CFP Industrial (Highway Corridor Industrial District)

Strength:
Good highway access, large flat properties, utility services, zoning will support broad spectrum of projects.

Weakness:
Unplanned land use, heavy industrial environment is unattractive; location is far away from workforce. Price appears to be high.

Airport District – Selected Properties

Strengths:
Good highway access, utility served, level sites, attractive setting, good access to the city. Spectrum of settings suitable for office, R&D and light industrial. Competitive pricing through IDI available. Properties shown are representative of the spectrum of settings in the Airport District (#9-office, #10-R&D/office, and #15- light industrial).

Weaknesses:
Lack of overall plan for maintaining quality development in District. High price of privately held properties, IDI participation to reduce price goes a long way to incentivize the attractiveness of the property.

Horizon Drive 3.2 Acres

Strength:
Attractive setting for office/commercial development, near entrance to airport and adjacent to business quality hotels and restaurants, good access to highways and city center, fully served with utilities.

Weakness:
Price, lack of a plan that will control development in area.

#10 Printers Court:

Strength:

Fully served sites with great access to highways, attractive office/R&D setting.

Weakness:

What is the overall plan for development here? Are there design guidelines? Price appears high for competitive market.

#15 800 Saccomanno Road:

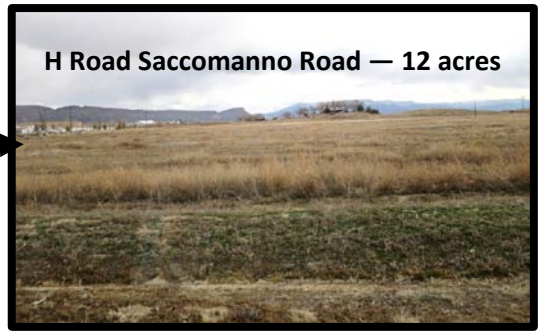
Strength:

Utility, flat site, attractive setting for light industrial development. Good highway access.

Weakness:

Price appears high.

(NOTE:#16 - 12 acres across Saccomanno owned by IDI. Site has similar characteristics, but could be offered and significantly lower price. Only negative is that it is nearer to residential.)



River District linked to downtown redevelopment area

Strength:

Area is utility served with newly updated road infrastructure. Attractive setting. Potential for gaining access to river. Downtown redevelopment will be enhanced with River District investment. This setting is suitable for office, light industrial, retail, commercial, and residential.

Weakness:

Potential site contamination could add cost and time to re-development. If proposed park investments do not occur as planned, development opportunities in this district will be diminished. Connection to downtown will add to attractiveness of River District. Unattractive legacy land uses will hinder investment. Lack of overall plan to control development could hold back investors.

River District – Kannah Creek Edgewater

Strength:

Primed for redevelopment. Unique setting can become a Grand Junction iconic brand.

Weakness:

Not clear what land parcels are available for development, cost & contamination unknown. Question: who will control look and feel of development?

Fruita Industrial Park:

Strength:

Utility/rail served sites with good access to highways.

Weakness:

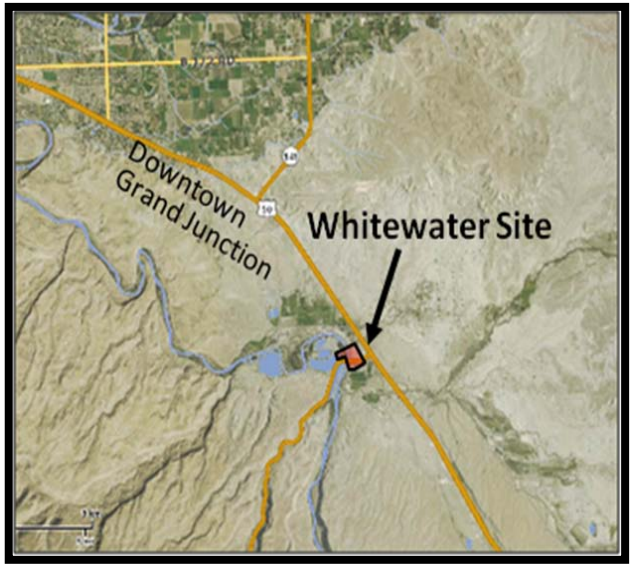
Heavy industrial and unattractive environment in surrounding area, located far away from workforce. Stopping distance on access road between highway and active mainline railroad crossing is too short creating a clear traffic hazard. Asking price is not competitive for the market and the location.

Whitewater Site(s):

Strength:

Good access along Hwy 50, good roads. Appears to have ability for large open sites and also possibility for rail. Good sites for industrial, ability to have good open space and space for expansion of large facility.

Impressive the City and County were able to quickly turn around GIS maps of the area.Other information will need to be collected.



Weakness:

Properties in area are not well documented, further delineation on zoning, permitted uses, parcel sizes, ownership, price, infrastructure at sites at site level is needed.

Tactical Recommendations

1) To facilitate the review of the various development areas, the Consultant Team defined five Districts – Whitewater District, River District, Airport District, Highway Corridor District, and Fruita District. Create a common nomenclature for development areas. This will help to create a common vision for economic development.

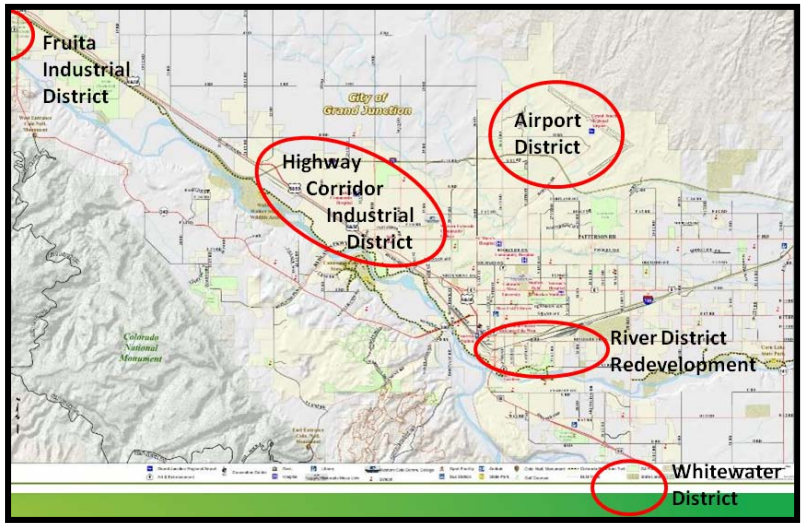
2) The multiple web inventories are confusing, consider combining and having one for industrial (i.e., Grand Junction is most extensive and has the GIS capabilities, combine city, county and Fruita). Goal: remove confusion and possibility of any of the information becoming out of date. Include links to area brokers for office and retail. Give context to the county, cities and multiple business parks, produce an area map of areas and business parks, and then drill to specific sites and buildings.

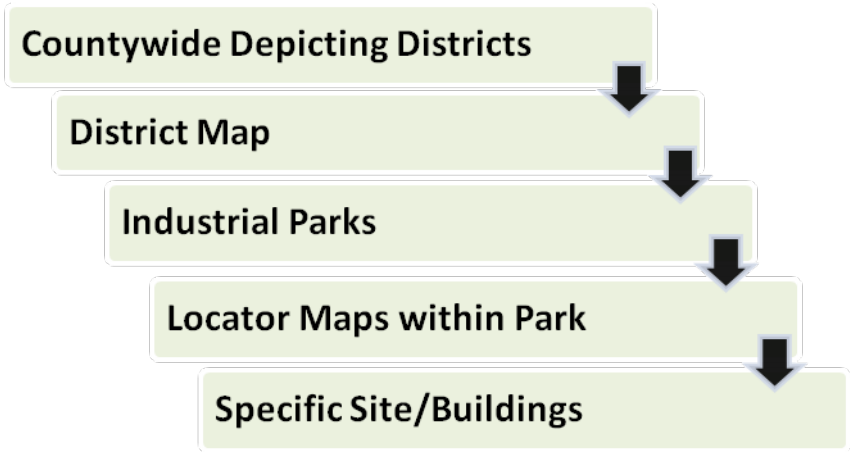
3) Prioritize sites by how close they are to being "shovel-ready."Ensure that documentation is managed for all sites.

4) Consultant Team noted areas with development potential but planning around those areas were unknown. Competitive communities know and plan for the type of development targeted of such sites. Grand Junction has opportunity for many catalyst projects, particularly River District. Work on creating a vision for the area by defining best uses for different properties in the portfolio.

5) Packaging sites (for website and for proposals/inquiries/promotions)use maps in a "step down" series:

   - Countywide map showing properties/districts.
   - District map with sites/buildings numbered (note: for Grand Junction an intermediate map showing all districts would be appropriate.
   - Industrial parks within a district, with information on park, type of park, i.e., tech, light industrial and large industrial include businesses located in park (this map is partially done).
   - Feature site on "locator map" – where it sits in district, site and





surrounding area. Color code according to type of property (office, light industrial, heavy industrial).

- Highlight IDI properties with notations.
- Detail site map showing infrastructure, size and location. Standardize property data (utilize branded property data sheets and create system for ensuring data is kept up-to-date).

6) Align property pricing with competing communities, e.g., Front Range or Provo.

7) Web presence – searchable inventories website can be very helpful but the target market will be from outside of the area and may not understand the landscape. As noted above, maps are the best way to provide a visual step down to understanding the region (broad view of the region, districts, business parks and then to key sites within that park, and then to detailed site maps).A process like this orients the viewer to the area and the extensive location opportunities available here. Mesa County is blessed with many choices. Give outsiders a chance to see and appreciate these.

8) A Google-type map showing the location of *major industrial companies* and other major employers is a good selling point – it demonstrates the diversity and depth of the local economy which many site selectors are looking for. It also show that there are successful companies operating in the region. The map could also be used to link to company profiles.

9) **Buildings** should be a critical part of the regions real estate portfolio. The pattern of development with the industrial users has been starting or locating to the area as smaller companies and growing to their presence size. The main reason was the company owner wanted to be located in the area not because it was market driven but it was *a location of choice*. If targeting smaller operations (< 50, <100 employees) it is best to provide a package that is turnkey….these operations are most likely not looking for sites but rather appropriate building to lease.

   - Create a portfolio of industrial/light industrial buildings that is easy for a prospective business to view, including location, footprint and lease costs.
   - If possible align buildings with target industries.
   - Consider adding a virtual building program component to the portfolio if there is not a good existing portfolio. A virtual building program can be a great selling tool, possibly a program that could be tied to the IDI properties.

70%

of companies looking for expansion or relocation want ***buildings***.

Utilities/Infrastructure

- Sufficient overview of providers and capacity of infrastructure. More documentation would be needed for a serious prospect.
- Broadband and internet connectivity and speeds a concern in Mesa County but current actions indicate there is a path for addressing and correcting this issue. Need to ensure priority sites and buildings being promoted have excellent high speed access.
- As noted in Real Estate, more in-depth infrastructure information is needed at the specific sites level.

Tactical Recommendations

- Improve individual site data sheets by including more detailed information on infrastructure at the site as well as total capacity of infrastructure for serving the industrial area, e.g. looped water system, electric transformers.
- Include information on sustainability by providers, conservation and efficiency programs, as well as incentive programs and eligibility for those incentives.

Location Factor:
Utilities & Infrastructure

What is being looked at…

Availability, reliability, high quality, redundant and reasonably priced:

- ✓ Potable Water.
- ✓ Waste Water.
- ✓ Electricity.
- ✓ Natural Gas.
- ✓ Communications.

Workforce, Training and Education

- Approximately 76,000 in the workforce; compares well with competitor cities; larger than Pueblo and St. George; within 10,000 of Ft. Collins.
- 49% of the population is of workforce age (ages 25-64).
- CMU and WCCC provide an available source of new labor entrants for business and technical occupations.
- Average hourly manufacturing wage: $23; slightly lower than State average; $3 to $5/hr higher than competitor cities.
- Mesa County Workforce Center: No cost services. Recruiting via state wide job database; hiring events listed on website. Tools: Prove It assessment system, WorkKeys, Job Profiler.
- Mesa County Workforce Center offers OJT and "customized programs" for employers.
- Western Colorado Community College: 24 programs of study including: agriculture, animation, culinary, CAD, construction, electric line work, machining, process systems, welding, and technology integration. Business & Industry Services: custom, ongoing courses; safety and compliance; supervisor training; LEAN mfg.
- Mesa County Valley School District: STEM focused elementary; two schools with voc ed. Challenge Program: for gifted middle school students. AVID and STRIVE: college prep programs for non-A students. Partnership with CMU and WCCC for college credits. SWAP Program offers skills training, job coaching, screening, work permits, hiring paperwork.
- Career Center has job-based learning, work skills, ethics; simulated work environment.

Tactical Recommendations

1) Workforce is one of the most critical factors in an expansion / location decision, consequently better documentation of what is available is now an important function of economic and workforce development organizations. It now requires better documentation of what is available at very detailed levels.

Location Factor:
Workforce,
Training and Education

What is being looked at…

- ✓ An available workforce that includes both skilled and unskilled workers.
- ✓ Ability to attract talent to move to the area.
- ✓ Available sources of new labor entrants (i.e. universities).
- ✓ Local wage rates and fringe benefits structure relative to competing cities.
- ✓ Work schedule practices.
- ✓ Work ethic.
- ✓ Labor/management relations.
- ✓ Industrial mix/industrial history.

2) As part of packaging and targeting, consider documenting workforce by industry sector – create a value proposition for new prospects. A package should include:
    a. Occupations by sector, by target
    b. Wage ranges
    c. Specific training for sectors/target and how shortages are being addressed
    d. Business case – stories of how it is successful
    e. Stories of how Workforce Center provides assessment, recruitment and OJT – case studies
    f. Document labor shed – the geographic region that supplies workers
3) If information cannot be gathered locally, consider contracting for a labor study that focuses on specific occupations and skills sets associated with industry targets.
4) Recommend conducting a survey of local employers to document turn-over rates, productivity, recruiting practices, and availability of management talent – primary data on the workforce and workforce practices of the local area is very valuable in evaluating a location.
5) Appears the region also has an under-employment component. It would be good to also consider a resident labor survey to identify the under-employment and skill set potentials.

Business Environment

- All communities and elected officials are supportive of economic development, each have their own opportunities based on available sites, buildings and local characteristics.
- Support of economic development is reflected in local city/county regulatory processes:
  - County has electronic permitting system; 6-step process clearly defined.
  - Grand Junction online permitting and information on city's main website**.**
  - Initial discussions now underway for one system for users, which is enlightening.
- County and Grand Junction demonstrated readiness and ability to quickly respond to requests.
- Fees appear to be in line with other areas.
- Local businesses give high rankings as a place to do businesses.
- Businesses and residents are very engaged in giving back to the community.

Tactical Recommendations

1) There could be a clearer, consistent message (by all parties) of the region's vision as it relates to economic development and future growth.
2) A formal business retention program appears to be done sporadically, with fits and starts, by one group or various groups. Businesses seem to know there are multiple people to contact for action. GJEP has access to Synchronist Program which could be shared for a good business retention program. This should be a discussion among entities on best way to effectively service existing businesses.
3) Complete due diligence on County sites and document all priority sites to be marketed.

Location Factor:
Business Environment

What is being looked at…

- ✓ Regulatory environment.
- ✓ Clearly defined process.
- ✓ Fast-tracking Services.
- ✓ Site/Building due diligence completed.
- ✓ Documented fees, costs estimates.
- ✓ Business taxes in line with competitor areas.
- ✓ How existing employer rank as a place to do business.
- ✓ Retention program.
- ✓ Community consensus, support for economic growth.

Business Costs & Resources

- Business operating costs for utilities are relatively in line with state averages.
- Average hourly manufacturing wages are lower than state average but higher than competitor areas, although media incomes and per capita are lower as a whole.
- No significant cost deviations from other areas.
- Potential onetime costs for upgrading or installing high speed "connectivity" and for property purchase seem high compared to competing areas including communities that offer better market access.
- No city business license (Grand Junction).
- No occupation, inventory, manufacturing equipment, industrial energy, and consumable mfg supplies taxes. Combined sales and use tax 7.65% (2.9 State; 2.0 County; 2.75 City).County personal property waiver.
- Corporate state tax 4.63% flat rate, relatively low, individual income tax is also 4.63%.Mesa County nonresidential property tax is 2.6% based on Colorado assessment rate of 29%, county mill levy of 88.
- Incentives were outlined in proposal prepared for the Project Team by GJEP. This information is also available on their website. It is not totally clear, there appears to be incentives available in various forms to help support business attraction but not organized to clearly communicate to prospective businesses.
- City/County Enterprise Zone Tax Credits: 3% equipment purchases; 1.5% commercial vehicle purchases; 12% job training expenses; $1,100 per new job; 3% R&D expenses; 25% vacant building rehab;
- City has incentives for Façade Improvements; reduced Transportation Capacity Payment for infill and redevelopment projects, utilities and certain fees for new development can be deferred.

Location Factor:
Business Costs and Resources

What is being looked at…

- ✓ Reasonable annual operating costs.
- ✓ One-time costs.
- ✓ Incentives, cost reduction.
- ✓ Technical Assistance.
- ✓ Financing & Venture Funds.
- ✓ Entrepreneurship.
- ✓ Incubator or Maker Space.
- ✓ Business and Trade Associations.

- Business Resources – the region is fortunate to have an abundance of business resources including:
    - Incubator space
    - Makers' space
    - Eight loan funds with capital base of $4.5M and capital to lend, partner with banks, SBA 504 lending available.
    - Emerging angel and venture funding
    - Business counseling, mentoring and coaching services – at different levels
- Industry Groups have been and are being organized around key sectors/clusters.
- Active Manufacturing Chapter, CAMA West connected to state manufacturing group, Colorado Advanced Manufacturing Alliance, with local representatives.

Tactical Recommendations

1) Tax rates and incentives are key to location decisions. Review how the tax rates are being presented to 1) sell as a benefit and 2) ensure the data is easy to find in one location on websites.
2) Position the incentives in promotional materials and website as a benefit. It would be helpful to have examples on the incentives, how do they apply to specific client projects, when and how they can be used.
3) Expand the description of the Hub Zone on GJEP website, why is it beneficial to a business and key locations. Links to SBA page, no maps to show Hub Zone locations.
4) The financial incentives portion of the GJEP website could be flushed out more to better describe how projects can be financed and how incentives can contribute to a project.
5) Services (coaching, mentoring, advisory teams) and loan program should be part of "value proposition" for target businesses and part of the recruitment package. The package should offer a 'turn-key' solution for businesses, such as, building space, working capital and equipment financing, incentives (deferred fees, upfront cost assistance), and business coaching/mentoring (advisory teams).

Organization Effectiveness

- There are multiple organizations doing different facets of economic development which can be confusing to the outsider. It took the consultant team considerable amount of time to understand who did what.
- Although all "say" they are collaborating and probably are when it comes to prospective clients, there appears to be no "shared value" agreement to working together:
    - County of Mesa, Cities of Grand Junction and Fruita, Town of Palisade, and related Commissions/Committees
    - Grand Junction Economic Partnership
    - Business Incubator Center, Maker Space, SBDC
    - Chambers of Commerce (Grand Junction, Fruita, Palisade)
    - Industrial Development, Inc.
    - Grand Junction Visitor & Convention Bureau
    - Grand Junction DDA & BID
- Workforce development is well-served by Mesa County Workforce Center and Western Colorado Community College with CMU as excellent education anchor continuing to draw more students.
- The City of Grand Junction dedicates all the lodging tax (visitor as well as business stays) to the VCB**,** average $700,000+ per year, a steady dedicated income stream**.**
- Business Improvement Districts support downtown development as well as marketing and has a dedicated income stream.
- Other economic development service providers (focused on business) do not have dedicated income streams. The total public-source funding dedicated to economic development, business attraction, retention, expansion and creation, is only 20% of the budget for VCB and significantly, 68-81%,below the average economic development funding (average $3-$5 per capita = $442 - $735,000 contribution).Economic development, business development, should be in same funding range as visitor attraction/tourism.
- Random acts of marketing have led to unclear and inconsistent messaging.

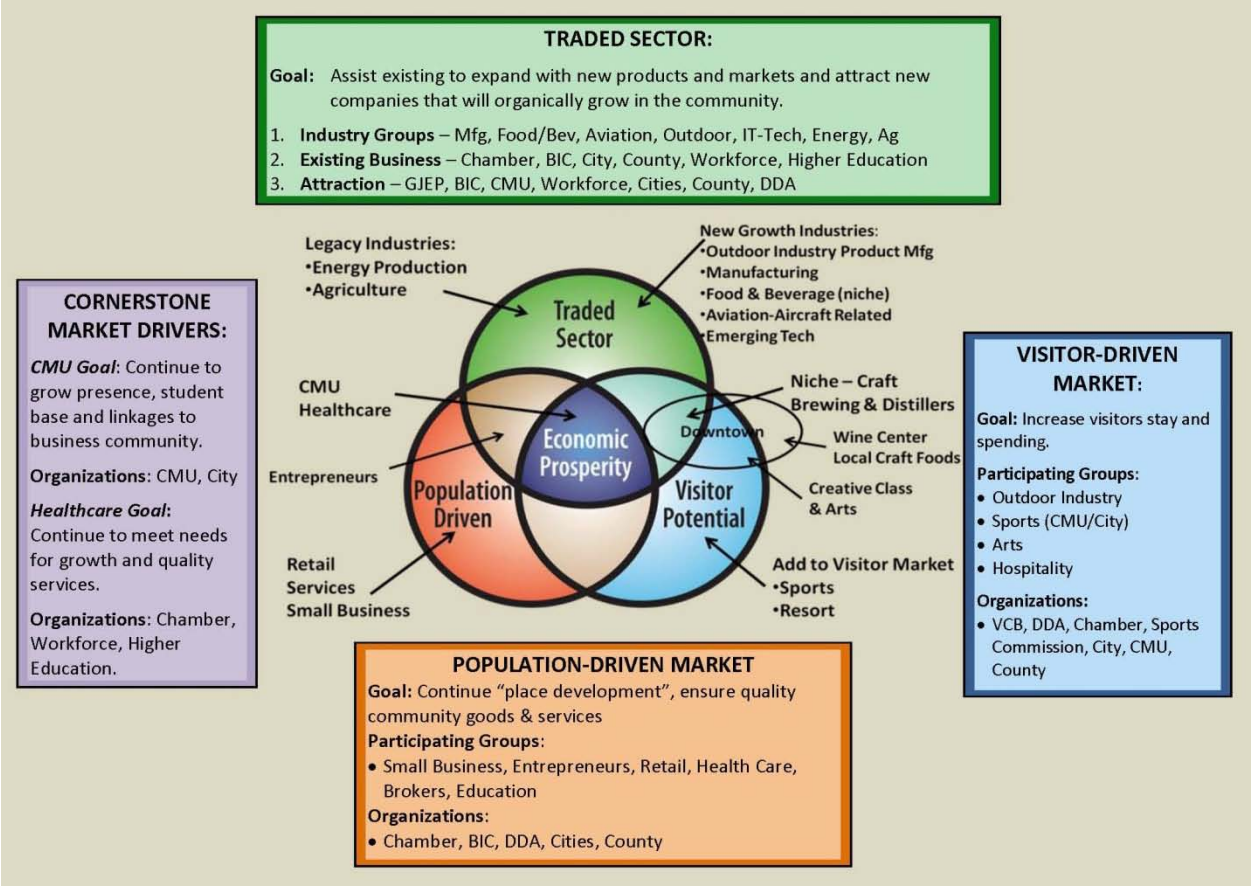
Location Factor:
Organizational Effectiveness

What is being looked at…

- ✓ A coordinated network of organizations and agencies align to market, provide assistance, solution and coordinate closing deals.
- ✓ Services align with local companies.
- ✓ Advocates for businesses.
- ✓ Industry consortia.
- ✓ Support by government with adequate funding.

Tactical Recommendations

1) Markets opportunities should drive the alignment of organizations and services. There is more than enough for everyone to do to leverage, time, talent and resources around markets that will grow and diversify the economy while helping businesses. Consider alignment with distinct responsibilities around market drivers as depicted below:



Potential roles as it relates to business development:

Industry Groups: *Drive development of services and actions needed to support Legacy Industries. Provide key information for other industries.*

Chamber: *Take the lead in managing the business retention program for existing industry, work with Legacy industries and Cornerstone Industries on addressing their needs, coordinate with workforce development on industry workforce needs.*

GJEP: *Focus on business attraction in Traded Sector, implement marketing campaigns and tactical targeting, create value proposition packaging.*

BIC:*BIC services are valuable in all sectors, leverage their tools. Participate in craft food and beverage niche strategy.*

Cities / County: *Build capacity by developing infrastructure, streamline regulations, create an ED response team, support visitor and business development strategies, and e.g. expand sports*, resorts.

Quality of Place

- Mesa County's quality of place is perhaps best said in a quote heard more than once during business interviews, "Great place to work, greatest place to call home."
- Mesa County poses qualities unique to it location that are hard to duplicate and highly valued by local businesses - Strong sense of place, unique physical region, outdoor – river sports, skiing, climbing, hiking, camping, road biking, mountain biking. *The natural geography of the valley is a rare asset.*
- The region's quality of place image is emerging to align with other unique nationally known communities including Bend, Oregon and Ashville, NC (in both examples, it took decades for these communities to achieve recognition).
- For industry, it is a ***location of choice*** – a key selling point.
- Mesa County has all the "ingredients" to be attractive to knowledge-based industries provided the ability to draw talent to the region can be documented.
- Two negatives on Grand Junction's appearance:
    - References to "grand junktown" – how Grand Junction looks from highways so becomes a "drive-thru" instead of a "drive-to" destination.
    - Difficulty in getting around, confusing to outsider.

Tactical Recommendations

1) Grand Junction and County consider a beautification program, particularly along the transportation routes and entrances. Consider pocket parks, art and landscaping that gives a sense of arrival. New interchanges reflect the quality of the area.

2) Consider creating a *way finding* signage plan.

Location Factor:
Quality of Place

What is being looked at…

- ✓ Climate.
- ✓ Housing affordability and availability.
- ✓ Quality schools, K-12.
- ✓ Health Care.
- ✓ Parks and Outdoor Recreation.
- ✓ Arts and Cultural.
- ✓ Entertainment.
- ✓ Security & Safety.
- ✓ Image and appearance.

Location Assessment Score Card

The following Scorecard is an indicator of the Consultant's ranking of Mesa County based on the field investigation. Grand Junction/Mesa County would make the ***favorable region*** list for a field investigation, however, would not be selected for ***Shortlisted Cities/Sites/Buildings***. At this time there are too many loose ends, relative high cost of land, concerns about skilled labor availability and transportation services availability/cost and disorganized economic development function.

Site Search Regions / Communities

1. **Regions**: A site search that would include Mesa County would include looking at 4-5 regions, e.g., Front Range, Salt Lake, New Mexico, Arizona and possibly Boise.
2. **Favorable Regions**: The regions would quickly narrow to 3-5 areas for field investigation, e.g., Ft Collins, Longmont, Pueblo, ex-urban areas of Salt Lake City, Provo.
3. **Shortlist Cities/Sites/Buildings**: The 3-5 favorable regions would be narrowed to 2 possibly 3 communities and sites/buildings for due diligence phase.

Location Factor Category	Possible Score	Score
1. Location – Market Access	35	20
2. Transportation	40	30
3. Mitigated Risk	5	5
4. Real Estate Portfolio	35	20
5. Utilities / Infrastructure	35	30
6. Workforce	35	20
7. Business Environment	30	18
8. Business Costs & Resources	40	30
9. Organization Effectiveness	25	10
10. Quality of Life	20	18
TOTAL	**300**	201

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III. Tactical Targeting

Lead generation and prospect conversion (deal closing) is the underlying goal of a Competitive Location Assessment.

This section will look at Business Recruitment, Packaging and Target Teams focused on Traded Sector industries.

The brand platform will be a separate document prepared by North Star Destination Strategies, lead consultant for the Grand Junction/Mesa County BrandPrint Project.

GJEP Existing Target Sectors

- Aviation & Aerospace
- Energy
- Food, Beverage & Agriculture
- Medical & Healthcare
- Outdoor Products & Services
- IT & Professional Services

Business Recruitment

Target Sectors

GJEP[2] is the lead agency for business recruitment. The target sectors identified for the area by GJEP, for the most part, align with the existing industries located in the region. Not all of the targets are actively recruited, i.e., attending tradeshows or direct marketing.

Currently GJEP is doing business recruitment, retention and attraction with all the target sectors. To achieve increased lead generation and conversion, consider business recruitment as the primary focus and be support for retention and expansion, i.e., legacy targets, provide recruitment services for specific business targets for that sector. Below is a framework for prioritizing business attraction targets and potential strategic focus. [3]

Legacy Targets	Three of the sectors—Agriculture, Energy Production and Medical/Healthcare—are "**legacy**" sectors. Legacy sectors reflect the region's current and historic economic and employment strengths, have projected national growth in employment and/or output, and have an imperative reason to be located in the region, e.g. market, natural resources. These sectors typically do not hold strong potential for *business attraction activities* as the location will already be known within the industry and they will naturally be drawn to it. ***Strategic Focus: Business Retention & Expansion*** Industry Group Representatives should drive and direct work efforts to support the continued growth of the legacy sectors.

[2] Grand Junction Economic Partnership

[3] Research Section includes additional data in industry sectors

Primary Targets	Primary targets represent those that are currently robust, show potential for future growth, have national annual growth projections for employment and/or output. This includes existing targets Aviation and Outdoor Products. ***Recommend***: Expand primary targets to include **Advanced Manufacturing**. The region has an excellent portfolio of growing global manufacturing companies and has a proven business case for their "location of choice" and success. This target aligns well with the CAMA West manufacturing group and efforts in workforce training, and provides one of the best economic impacts of any industry sector. ***Strategic Focus: Business Attraction***
Emerging Targets	IT and Professional Services are a strong emerging market for the region. They have high projected growth in employment and output over the next ten years both nationally and in Colorado. The region is just beginning to experience growth in this sector and should be in the position to capture some of it because it has the ingredients to offer a good value proposition for this sector, particularly lifestyle for employees. ***Strategic Focus: Business Attraction***
Niche Targets	Aligned with the region's agriculture roots are existing and emerging niche industries in the Food and Beverage sectors; this includes iconic anchors as well. Outdoor Products and Services is also a niche market to some extent. The benefit is the ability to have focused value propositions to attract growing niche markets; often these will be very small businesses or start-ups. Example: Craft brewery and distillers is a popular niche market. These are often very small or start-up operations that will need a lot of assistance and mentoring to grow market share. The services offered by BIC fit this market. A creative location will be key to longer success, such as Houston's Downtown Brewery Incubatorhttp://breweryincubator.com or Florida's BrewHub, (same for distillers) http://brewhub.com ***Strategic Focus: Entrepreneur/Business Creation & Niche Attraction***
Market Opportunity Targets	As noted on the Economic Market Drivers graphic there are non-traded sector opportunities. Because of the unique lifestyle, the area attracts entrepreneurs. The growth of the sports cluster is very compelling and may require support and nurturing to expand opportunities for 1) attracting visitors for tournaments and competitions (e.g. Palisade Sport Shooting Complex); 2) retail growth for downtowns as visitor demand grows; and even 3) opportunity for resort development. ***Strategic Focus: County, Cities & Organization Collaboration***

Creating the category framework for the targets will help with the strategic focus as there are different "value propositions" and "attraction presentations" for each category.

…tactical targeting, creating a value proposition that will interest/offer high level of benefit to the intended target (differentiated from competitor pitches).

Location and Business Characteristics

There is a theme to the current traded-sector locations (other than legacy) that helps to narrow the business types to target.

- The area was a "location of choice."
- Something, other than looking for a location, brought them.
- At the time, companies were owner-operated, closely-held.
- Decision was personal, mainly for lifestyle, and handled the location themselves.
- Company was relatively footloose, not tied to a certain market access.
- At the time were smaller (20 to 30 employees) and have since grown in the good business climate (88% of the Mesa County businesses are under 20 employees).

Other factors to consider related to selecting the characteristics of the business target are:

- The available product (real estate) is mostly smaller sites, although there are some large sites.
- Primary businesses will be most interested in business parks and neighbors.
- The perceived distance, from a business perspective, will be a challenge to overcome.

Geographic Targeting

Recommend the business recruitment efforts be focused more on direct market to businesses in the target sector that:

1) Have employment of 10 to 50,
2) Are owner-operated (owner is part of decision process),
3) Are geographically located within daily direct plane flight from Grand Junction.

Note: Chicago is included. Although not within "one plane flight," it has one of the largest concentrations of primary, niche and emerging targets and the lifestyle offered in Grand Junction/Mesa County is not readily available in this mega-metro.

The chart below is an indication of the potential geographic market size for direct business marketing—29,000 firms; 24,000 with less than 50 employees; over one million in total employment with a combined average wage of $51,821.

PRIMARY, NICHE, EMERGING TARGETS BY GEOGRAPHIC AREA					
	Aviation	Manufacturing	Sporting Goods and Cycling Equipment	Health Food Nutritional Supplements	Back Office
Total Number of Establishments					
Chicago	57	10,484	42	10	1042
Dallas	175	5,482	20	8	889
Houston	59	5,351	22	8	521
Phoenix	60	2,994	20	6	513
Salt Lake City	9	1,402	19	5	230
Establishments with LT 50 Employees					
Chicago	54	8,763	39	6	917
Dallas	159	4,542	16	7	751
Houston	55	4,434	21	4	460
Phoenix	50	2,617	17	6	439
Salt Lake City	8	1,216	17	4	190
Total Employment					
Chicago	614	386,289	916	770	32,112
Dallas	3,392	223,641	586	92	35,121
Houston	906	214,878	376	425	16,221
Phoenix	1,748	97,129	974	175	24,704
Salt Lake City	75	47,506	578	120	12,573
Average Wage					
Chicago	$50,619	$59,599	$49,817	$67,431	$47,455
Dallas	$56,478	$56,740	$47,508	$32,261	$59,017
Houston	$48,924	$68,219	$30,367	$51,600	$65,400
Phoenix	$51,383	$59,051	$61,594	$65,908	$43,339
Salt Lake City	$33,507	$56,142	$46,920	$28,142	$58,107

Source: County Business Patterns data for Metro Areas, 2012 (newest available).

Packaging

Packaging for direct business recruitment will be different than what currently exists for marketing and business presentations. Packaging should be collaboratively prepared so all the business resources are brought to the table and presented as part of the unique advantages of a Grand Junction/Mesa County location.

Packages need to focus on what will be most important to a business in each industry category, will entice them to make a decision, and show that the business can operate successfully in this location.

Businesses with smaller employment often don't consider relocation; they are focused on growing their business. But the opportunity and a turn-key package to operate in an area with an incredible lifestyle, other successful businesses, and where organizations will help them grow their business, can be compelling.

Larger businesses may consider expanding and locating a facility in the region. Most expansions are market-driven, such as, west coast to east coast expansions to capture market share; or are driven by a local market demand which means the business may be already looking at and aware of the region. These could be geographic targets but the "package" would be different based on traditional location factor decisions.

Collaborate on creating a sales story and package that is value driven—quality of place, business resources. The strong business resources at the BIC should be a part of the package.

- 70% will want an existing building; have specific buildings and floor plans in the package;
- 80% will want to lease unless there is a financing option that makes it attractive to buy;
- Financing for equipment and working capital;
- Moving costs, particularly equipment;
- Ease of location;
- Connection with other businesses (industry groups) and within the community;
- Offer Advisory Teams of industry experts who dedicate time through a network to assist local businesses capture more market share. Promote the expert coaches and work they have done (this already exists with BIC, just repurpose and package);
- Family and lifestyle.

Packages for emerging and niche markets will be different than for primary targets, i.e.

- IT will need to focus on labor, talent available, training, connectivity, space and costs while promoting the lifestyle the talent seeks;
- To craft brewers/distillers offer identified locations with support services from advisory teams.

Also consider a backward packaging exercise; we have this asset, e.g. a building -who will be our most-likely business-specific target. This type of targeting will also highlight product needs such as buildings, labor documentation or occupational training.

Target Teams

Three key objectives should guide business recruitment efforts:

1. Diversify the economy
2. Attract new jobs and investment
3. Become known as the "location of choice" by business, outdoor enthusiasts and connoisseurs.

Planning, organizing and aligning around the targets will help leverage resources, build better value proposition(s) and allow organizations to focus time and expertise on areas where they can best concentrate and contribute to the whole by being a lead or a support.

	Legacy	Primary	Emerging	Niche	Opportunity
Strategic Focus	Business Retention and Expansion Driven by Industry Group to address their needs	Business Attraction Geographic Targeting	Business Attraction	Entrepreneur, Business Creation, Niche Attraction	Planning Collaboration
Targets	Agriculture, Energy Production, Medical & Healthcare	Aviation/Aerospace, Advanced Manufacturing, Outdoor Products	IT Professional Services	Food & Beverage Craft Beverage Outdoor Services	Sports, Resort Development Retail
Teams	Industry Groups, Chamber, BIC, Workforce/Education, GJEP	GJEP, Industry Groups, BIC, DDA, Chamber-IDI	GJEP, Workforce, Education, Brokers (Buildings), Cities	GJEP, BIC, DDA, Chambers	Sector Committees, County, Cities, DDA, VCB, Chambers

Selling Points:

- Located in a dramatic landscape—outdoor recreationalist dream
- Dynamic University, educated population
- Highly engaged businesses, leaders and residents
- Attractive to the 20 to 40 year old demographic
- Robust creative arts and culture community
- Trailblazer attitudes

IV. Place Development

Place development is about the physical aspects of the various communities.

Place development is led by and is mainly the responsibility of Cities and County to improve their attractiveness for new investment and meet the needs of existing industry.

Following are broad place/product development actions to improve attractiveness to investors, followed by specific observations of each city and the county. The activities around sites and buildings will normally be private-sector driven and done by owners and developers, except for publicly-owned lands.

- Sites and buildings portfolio
  - Bring priority sites to site certification level.
  - Given the limited industrial building portfolio, consider a virtual building program (pre-approved site and building plans, but not built); possible partnership with IDI.
- Continue to work on high-speed connectivity and Smart Connected Communities planning (Cisco and Google models).
- Use capital project as part of business attraction stories and promotion—*investments back in the community*.

In addition to the physical beauty of the region, each city in the valley is unique and has its own personality. Grand Junction is "book-ended" by Palisade and Fruita, a unique location position.

Town of Palisade

The Town of Palisade has a well established niche in the visitor market. It is well known for wines, wineries and peaches, and is very active in creating well-attended events.

Palisade does not have industrial land; their focus is on attracting and serving the visitor. Existing buildings in the downtown give opportunity to attract and assist small unique shops as well niche food and beverage producers. The area wineries and fruit producers are growing in the value-add market with the help of the SBDC.

The development of the Palisade Camero Sport Shooting and Education Complex will add an additional mix to the visitor attraction, including training, tournaments and competitions. The partnership with state agencies and commitment of funding is impressive.

City of Fruita

Fruita has created a unique identity and is well-known internationally for its biking trails and its "funky" spirit.

For economic development, the City should continue to focus on bringing unique businesses to the downtown and rethink how to position Greenway Industrial Park.

Downtown: there are issues and constraints with some of the older, historic downtown buildings that will need to be removed, mitigated or incentivized to make them attractive to users.

- Package the vacant buildings with information on sizes, conditions, terms, incentives (such as improvement or façade grants/loans), and the business assistance programs to help small businesses survive in small markets.
- Identify potential uses for vacant buildings.
- Prepare a wish list of businesses or types of business for downtown (or community).
- Distribute packages to business that 1) fit Fruita's personality and market position, 2) are located in similar communities and could consider a second store; and 3) are familiar with visitor destination markets. Target independent businesses.
- Continue with SBDC to target local entrepreneurs and opportunities for retail/service locations downtown.
- To enhance and leverage the downtown, City should control the look and feel of development throughout the community.

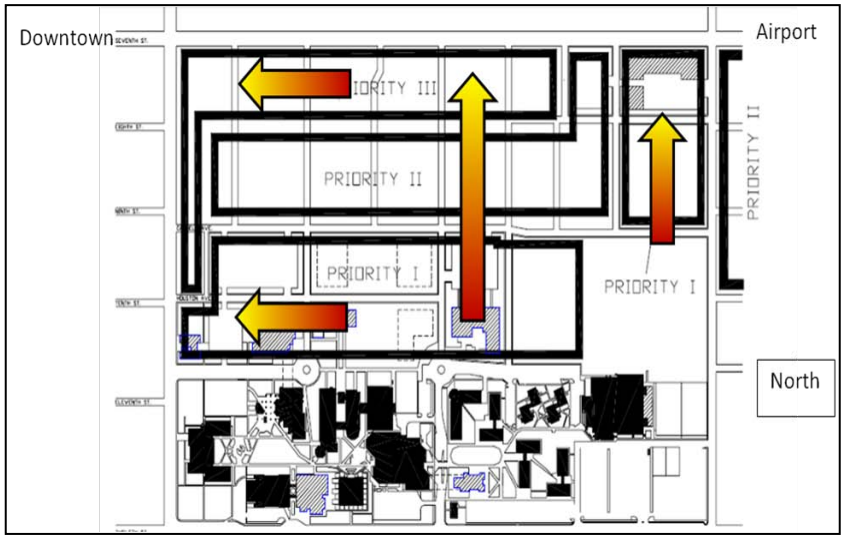
Greenway Industrial Park: As mentioned in the real estate assessment, the industrial park has some challenges with costs and the stopping distance concern after crossing the railroad tracks before entering the highway. Consider rethinking how this park can be positioned, such as:

- Design a park that has the unique feel of Fruita.
- Clean up the park; add landscaping an intriguing entrance (art).
- Discuss with owner their willingness to be the developer, build buildings and lease vs. sell property.
- Consider a virtual building program with the owner, if owner is willing to be a landlord.
- Create a portfolio of five or six buildings in varying sizes (5,000 to 25,000 SF) with unique architectural design, cool, funky colors and industrial—unique character.
- Good targets will be small businesses with 10 to 20 employees, small product production using UPS or FedEx for distribution.
- Promote as unique park for the creative, cool, outdoor enthusiasts.
- Work with GJEP to identify target lists and positioning with their marketing.

City of Grand Junction

Grand Junction is the regional hub of the valley and place development is extremely important to set the stage for attracting all sectors. Grand Junction has the opportunity to build on unique assets, such as, Downtown, River District, Los Colonias and unique developments on City-own sites.

- Key issue is to continue working on broadband and high-speed connectivity.
- Consider looking into Smart Connected Cities and Google cities, continuing to position Grand Junction as a smart, connected city.
- Grand Junction was often referred to as the *drive-thru*, *malfunction junction* or *the junkyard* during interviews and focus groups. Institute a beautification program along the corridors and entrances. Screen unpleasant views from the freeways.
- Promote along the corridors Grand Junction's origins, joining of the rivers.
- Work with IDI, local industrial property owners, and developers on the concept of virtual buildings for marketing to smaller and mid-sized businesses interested in leasing vs. build-to-suit.
- Continue the Sports Development strategy. Grand Junction's reputation and position with JUCO and CMU's sports is a tremendous opportunity to add a unique mix to the valley's overall visitor attractions. Continue moving forward with plans to attract sports teams, venues, fields, tournaments. Position as the place for sports which will compliment Fruita, Palisade and the County's offerings, thereby creating more and longer visitor stays.
- Continue plans to revitalize the Convention Center and bring a sports anchor.
- Related to the visitor market, consider opportunities for a resort development linked to publicly-owned land and the golf course.
- Begin to plan space for emerging markets, specifically info tech (downtown).
- For the emerging markets and the millennials attracted to those jobs, downtown living will be important—artist lofts, cool neighborhoods—*have a good head start on this already.*
- CMU leadership recognizes their continued growth requires engaging with the community to make the college experience more rewarding for students. It is logical to connect downtown with the campus in the seven to 10-year Campus Growth Plan.

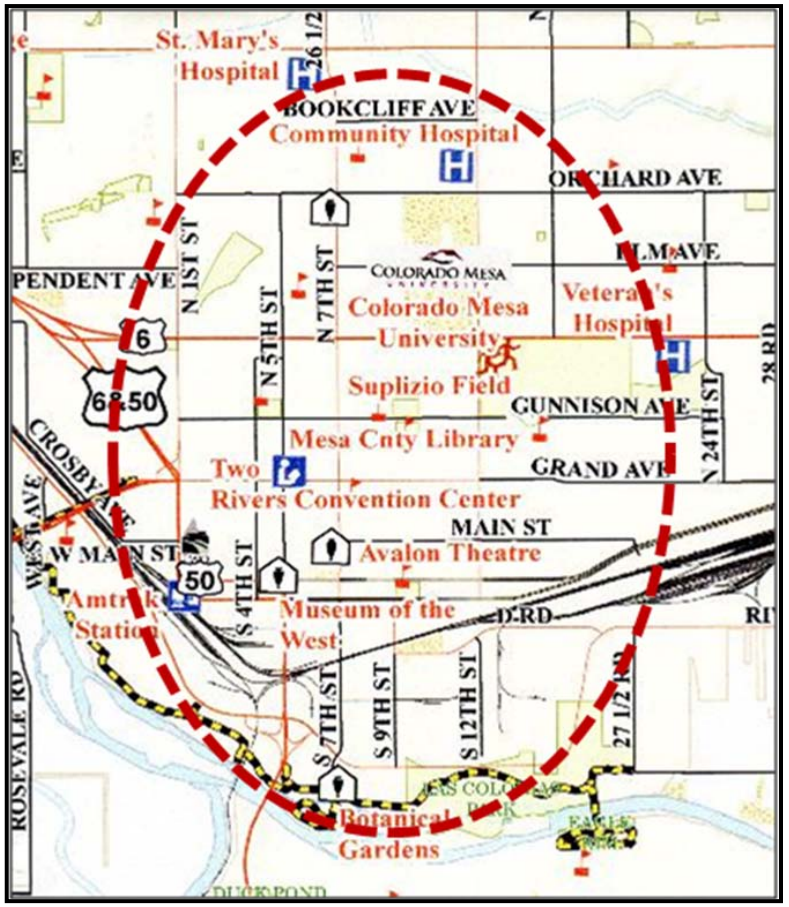


Following are observations from the site tour on development strategies for downtown, CMU linkage to downtown, River District and Los Colonias projects.

Connecting People and Institutions with Place is Key

Vision: Position Grand Junction as a center for business and innovation in an attractive lifestyle setting.

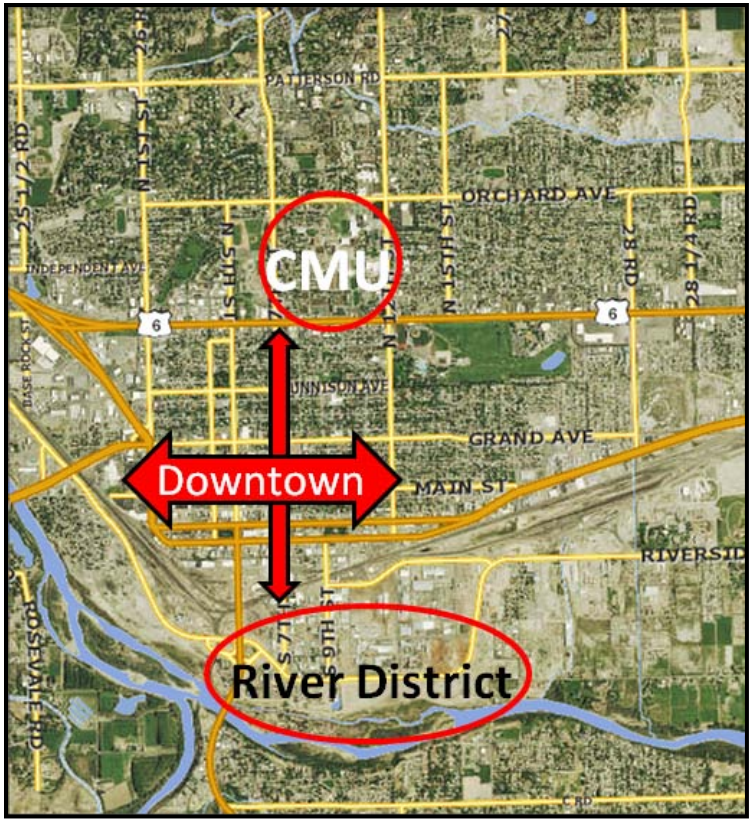
- Continue establishing Grand Junction as the cultural center of the region by supporting sports, entertainment, arts and education.
- Position the urban center to be a vibrant employment and residential center by encouraging business collaboration, innovation and entrepreneurship.



Connectivity will strengthen CMU, facilitate development in Downtown and the River District, and generate jobs.

Pieces already in place will support the integration of CMU and River District with Downtown.

- CMU is developing toward 7th and North Avenue.
- Infrastructure and park investments are transforming the River District.
- Grand Junction's growing, healthy downtown is fertile ground for new ideas and businesses.
- Introduce regular bus service (including late night schedule) to facilitate student and faculty use of downtown.
- Move forward aggressively with the Los Colonias project to stimulate development along the river.
- Establish a Downtown/River District presence for the Business Incubator to support entrepreneurship.
- Establish presence for CMU Engineering program in downtown to support collaboration with Incubator.



COLORADO MESA UNIVERSITY

Mesa County

The County is a key player particularly with valley-wide infrastructure issues such as transportation and Enterprise Zone. The County is a key supporter for the business environment and economic development throughout the County, and plays a big role in visitor attraction venues, such as the Mesa County Fair and the well-known Country Jam.

Mesa County Fair

Specific place development projects include:

- Whitewater Park. As noted in the real estate assessment this area has good access to Highway 50, infrastructure is in the streets, there appears to be large parcels although the topography has some rolling hills. While this adds to the character of the area, it could add to cost of development. The area is conducive for heavy industrial; the land is privately-held. More documentation is needed to fully understand the property, i.e., zoning, sales prices, paper-only lots, ability for rail spur or rail off/on loading.
- The Loma area does not have industrial parks or zoned industrial areas per se. It represents the agriculture roots of the county. There could be opportunities to work with the agriculture community on local strategies.
- Agriculture sector is mainly located in the county and is one of the largest economic contributors to the economy. It is a Legacy industry driven by the local agriculture interests. The County could facilitate discussions with local agriculture leaders to identify opportunities for more "value-add" products, such as locally-grown, organic, branded beef—Colorado's Western Slope beef.
- Workforce is a key business location asset of the county and Workforce Development is a countywide effort. It is important that workforce be engaged not only with training and placement but in documenting the talent (occupation levels, skills sets, productivity and availability). Special training courses, or academy training, focused on specific occupations and skills sets needed by target industries, such as manufacturing, back-office technical support, are great positioning and a testimony that the area is prepared for and understands the needs of new industry.
- Collaborate with Cities on transportation, bike trails and riverfront projects that will attract more visitors.

V. Research

The following pages include research conducted relative to the Corporate Location Assessment. It is provided for review and reference.

- Community Snapshot – Competitor Comparison
- Economic Base Review 2013-2008
- Economic Base Research – Industry Tables by 6-digit NAICS Code
    - Location Quotients
    - High Growth Industries – Colorado
    - National High Growth Industries
    - Emerging Tech Industries
    - High Growth Small Industries
    - Existing Business Sizes.

Documents completed and submitted during the Location Assessment separate from the report include:

- Mock Project Proposal Review
- On-site Location Assessment Tour Debrief Presentation, February 19, 2015

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Community Snapshot – Competitor Comparison[4]

				Competitor Cities		
Data	Grand Junction	Mesa County	Colorado	Ft Collins CO	Pueblo CO	St George UT
Demographics (U.S. Census Bureau, 2013 American Community Survey)						
Total Population	59,442	147,432	5,119,329	148,975	107,931	75,361
Population Under 18	25.6%	26.3%	26.8%	25.1%	26.5%	31.7%
Population 25 to 64 Years	49.6%	51.3%	54.8%	49.4%	51.0%	42.1%
Population Over 64	15.8%	15.3%	11.4%	9.0%	15.5%	18.9%
Median Age	35.5	38.2	36.1	29.7	37.8	33.7
% Population Growth 2010-2012	1.2%	0.8%	2.7%	5.2%	1.2%	5.1%
Work Force (Bureau of Labor Statistics; February 2015 data; *U.S. Census Bureau, 2013 American Community Survey)						
Total Labor Force	29,330	72,445	2,810,558	86,765	46,861	31,563
Employed	27,284	68,127	2,679,254	83,448	43,319	30,325
Employed %	93.0%	94.0$%	95.8%	96.2%	92.4%	96.1%
Unemployment Rate	7.0%	6.0%	4.2%	3.8%	7.6%	3.9%
Unemployment Rate (Annual Average 2014)	6.8%	6.0%	5.0%	4.0%	8.0%	4.0%
Commute time, average (minutes)*	16.0	21.8	24.6	18.5	17.6	15.0
Income and Wages (U.S. Census Bureau, 2013 American Community Survey; Bureau of Labor Statistics, QCEW, Annual 2014 data)						
Annual Average Weekly Wage	$844.00	$844.00	$1,253.00	$1,525.00	$1,103.00	$705.00
Median household income	$44,409	$47,401	$57,892	$53,435	$34,152	$46,493
Per capita income	$25,530	$25,860	$30,982	$28,760	$19,581	$21,782
Families at or below poverty	14.1%	11.5%	9.1%	7.5%	18.2%	10.4%
Educational Attainment (over 25 years) (U.S. Census Bureau, 2013 American Community Survey); (Colorado Dept of Higher Education; Utah Dept of						
Less than High School	8.1%	9.8%	9.6%	4.7%	15.6%	9.3%
High School Graduate	28.4%	30.0%	22.0%	14.0%	29.1%	23.2%
Some College	26.1%	28.5%	22.8%	20.5%	25.6%	28.9%
Associate's Degree	9.0%	9.1%	8.3%	9.1%	9.9%	10.1%
Bachelor's Degree	19.2%	17.1%	23.6%	31.8%	11.9%	17.7%
Graduate or Higher	9.2%	8.3%	13.7%	19.9%	7.9%	10.9%
Drop-Out Rate	3.6%	3.6%	7.6%	2.1%	2.9%	4.0%
Graduation Rate	82.3%	77.2%	77.3%	84.6%	71.9%	88.0%
High scholl students going on to college	61.8%	52.7%	60.9%	62.1%	48.2%	67.0%

[4] Data collected, most recent available 2010-13, except where noted. Prepared March 2015, updated June 2015

Data	Grand Junction	Mesa County	Colorado	Competitor Cities		
				Ft Collins CO	Pueblo CO	St George UT
Educational Quality (Colorado Dept of Education; Utah Dept. of Education, 2013-2014 school data)						
Average ACT Score (1)	20.4	19.8	20.3	22.3	18.1	n/a
Expenditures per pupil	$6,660	$9,032	$7,025	$6,654	$6,932	$7,689
Pupil-Teacher Ratio	17.7	17.7	17.6	17.2	17.1	22.1
Employment by Industry (%) (Bureau of Labor Statistics, QCEW, 3Q 2014 data, County; Colorado & Utah LMI, Feb. 2015, State & MSA data)						
Construction, Mining, Construction	10.9%	11.9%	7.2%	6.6%	4.6%	8.8%
Manufacturing	4.5%	4.7%	5.5%	8.5%	7.9%	5.1%
Wholesale Trade	4.2%	4.2%	3.9%	0.0%	2.1%	2.2%
Retail Trade	12.8%	12.8%	10.1%	11.1%	12.0%	14.6%
Transportation and Warehousing	4.2%	4.5%	3.1%	1.9%	3.4%	6.4%
Information	1.1%	1.3%	2.7%	1.6%	1.1%	1.2%
Finance and Insuance and Real Estate	5.0%	4.9%	6.2%	0.4%	3.1%	3.8%
Professional and Business Services	8.8%	9.5%	15.3%	12.4%	11.0%	7.4%
Educational Services and Health Care	15.3%	23.6%	12.4%	10.3%	19.3%	16.6%
Leisure and Hospitality	12.3%	12.8%	12.4%	12.3%	10.2%	14.6%
Other Services, except Public Admin.	4.0%	2.9%	4.0%	3.7%	3.4%	2.9%
Public Administration	16.3%	5.5%	16.6%	24.3%	21.1%	10.1%
Taxes (Colorado Dept of Taxation; Utah Tax Commission, 2015 data)						
Corporate Tax	4.6%	4.6%	4.6%	4.6%	4.6%	5.0%
Income Tax	4.6%	4.6%	4.6%	4.6%	4.6%	5.0%
Property Tax (based on appraised value)	6.0%	6.0%	6.0%	6.0%	6.0%	0.007%
Other (Sales)	7.6%	7.6%	7.6%	7.6%	7.6%	6.3%
Cost of Living/Housing (Local Real Estate Listings; Sperling's Best Places, 2014)						
Cost of Living Index (U.S. Average = 100)	101	101	112	113	83	102
Median new home price (2BR/1200+/- SF)	$179,800	$180,400	$236,900	$247,200	$105,400	$196,700
Safety (2013 FBI Uniform Crime Report; 2013 FBI Police Employment Data; 2013 Census US Fire Administration/Local Fire Dept.)						
Violent crime rate (per 1,000 population)	4	3	3	2	9	2
Property crime rate (per 1,000 population)	42	18	27	56	70	23
Police staffing (per 1,000 population)	1.8	0.7	2.3	1.3	1.7	0.5
Fire staffing (per 1,000 population)	1.9	1.0	1.2	0.9	1.3	0.4

Data	Grand Junction	Mesa County	Colorado	Competitor Cities		
				Ft Collins CO	Pueblo CO	St George UT
Average Commercial/Industrial Pricing (Local real estate offices, Loopnet.com & Commercial Search; June 2015 data)						
Retail (nnn lease)	$12/sf/yr			$18/sf/yr	$10/sf/yr	$12/sf/yr
Class A, B Office (nnn lease)	$10/sf/yr			$13/sf/yr	$12/sf/yr	$11/sf/yr
Industrial Building Lease (nnn lease)	$5-$8/sf/yr			$8/sf/yr	$8/sf/yr	$6/sf/yr
Industrial Sites for sale	2.63-5.26/sf			6.57/sf	6.51/sf	6.77/sf
Download Speed, Wired (% of population) (National Broadband Map; June 2014 data)						
> 3 Mbps	100%	94%	96%	100%	96%	99%
> 10 Mbps	42%	38%	90%	100%	95%	99%
> 25 Mbps	19%	14%	83%	100%	87%	99%
> 50 Mbps	1%	1%	80%	100%	83%	99%
> 100 Mbps	1%	7%	78%	100%	83%	99%
> 1 Gbps	1%	1%	8%	99%	1%	99%
Upload Speed, Wired (% of population) (National Broadband Map; June 2014 data)						
> 3 Mbps	100%	92%	93%	100%	87%	99%
> 10 Mbps	10%	8%	83%	100%	85%	99%
> 25 Mbps	1%	1%	11%	99%	3%	99%
> 50 Mbps	1%	1%	9%	99%	3%	99%
> 100 Mbps	1%	1%	9%	99%	3%	99%
> 1 Gbps	1%	1%	8%	99%	1%	99%

(1) ACT Scores - Composite of English, Math, Reading and Science scores;
National average is 21.1; Scores range between 1 and 36 (the highest possible score)

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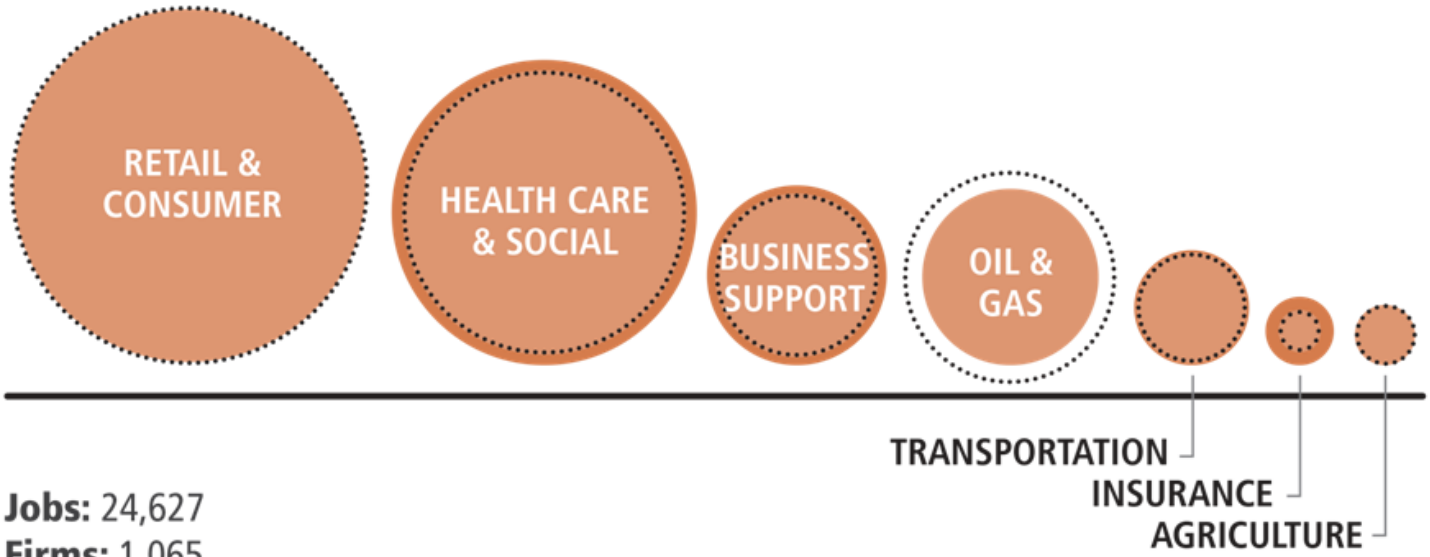
Economic Base Review 2013-2008

Largest Industries

Industries with 250+ Employees (Mesa County)

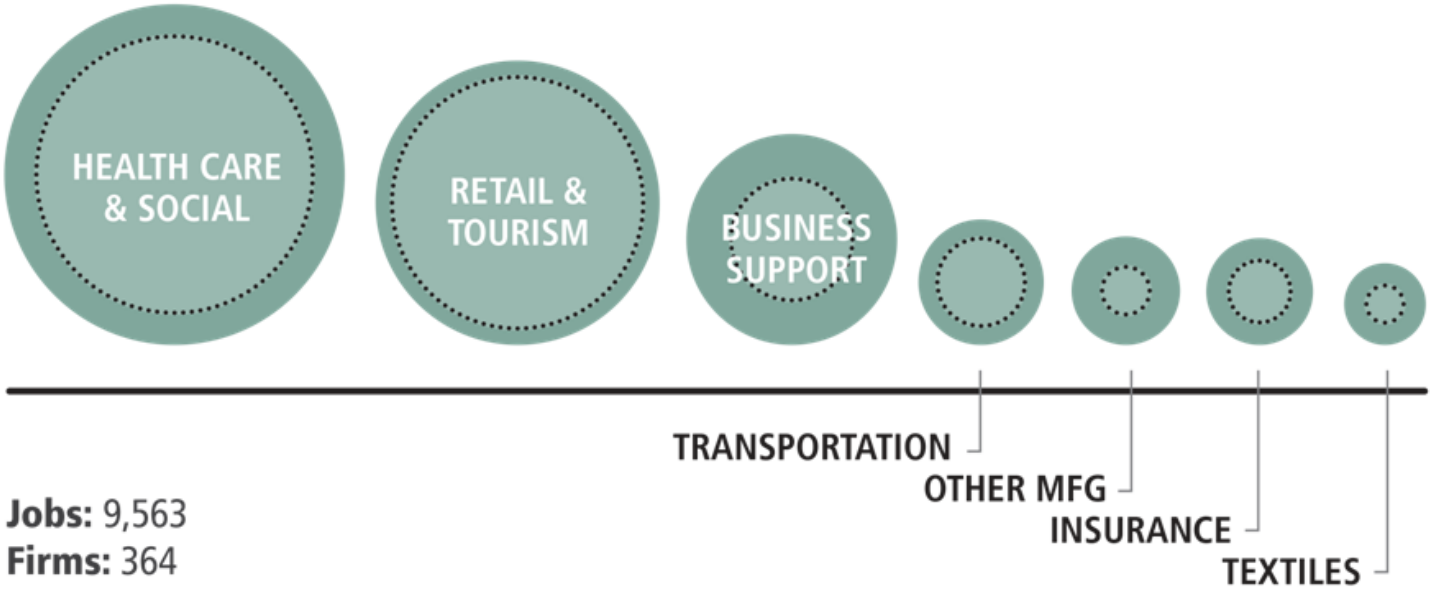


Jobs: 24,627
Firms: 1,065
LQ: 0.57–17.29
Avg Wage: $12,576–$93,765

Mesa County Employment in 2013 2008

Growth Industries

Added 50+ Jobs in 5 Years (Mesa County)

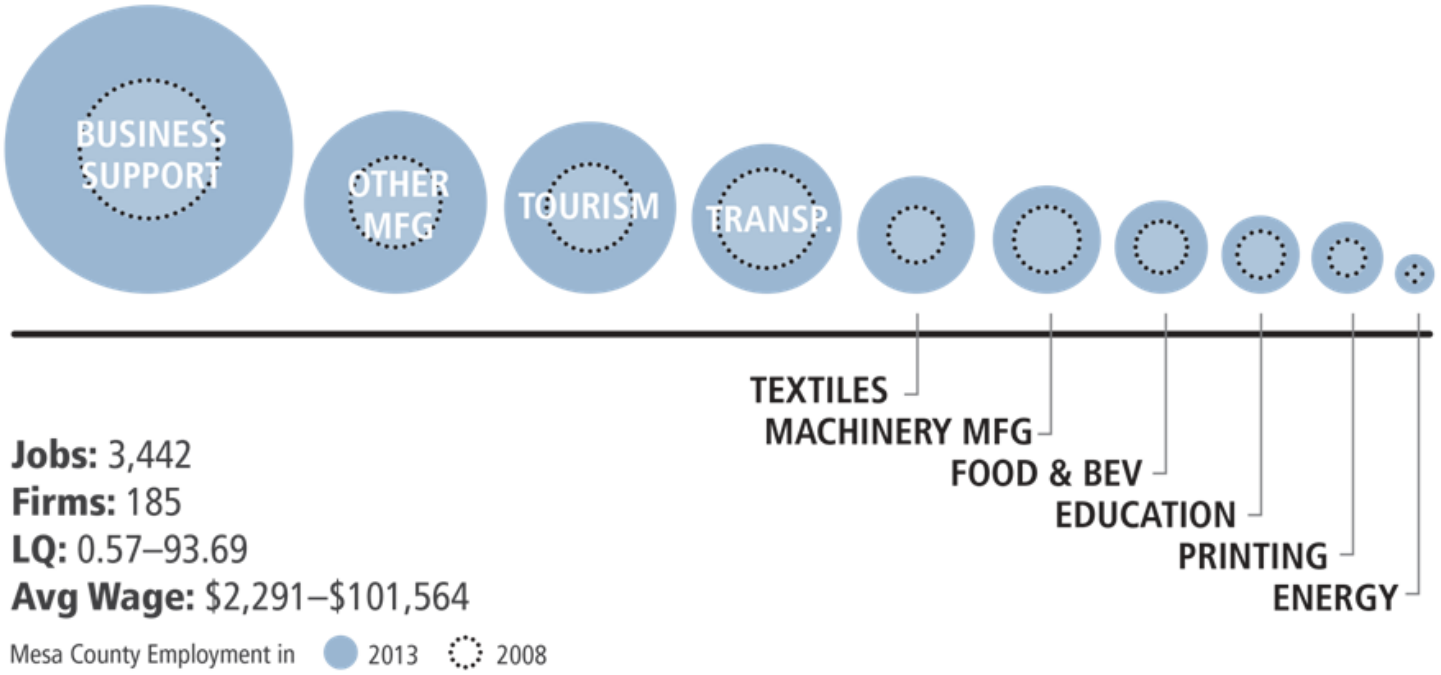


Jobs: 9,563
Firms: 364
LQ: 0.15–93.69
Avg Wage: $12,576–$101,564

Mesa County Employment in 2013 2008

Emerging Industries

Grew at least 50% in 5 Years (Mesa County)



Jobs: 3,442
Firms: 185
LQ: 0.57–93.69
Avg Wage: $2,291–$101,564

Mesa County Employment in 2013 2008

Emerging Tech Industries

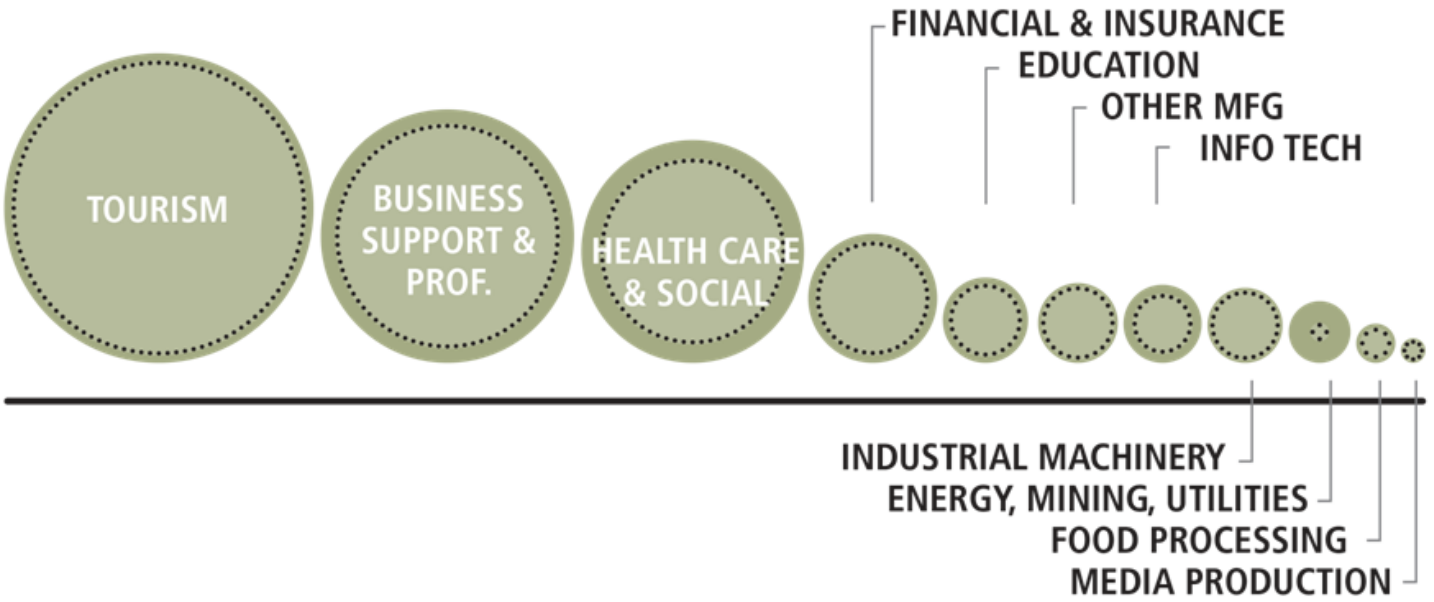
(Mesa County)

Jobs: 394
Firms: 161
LQ: 0.04–1.27
Avg Wage: $26,601–$131,544

Mesa County Employment in 2013 2008

Statewide Growth Industries

Added 250+ Jobs in 5 Years (Colorado)

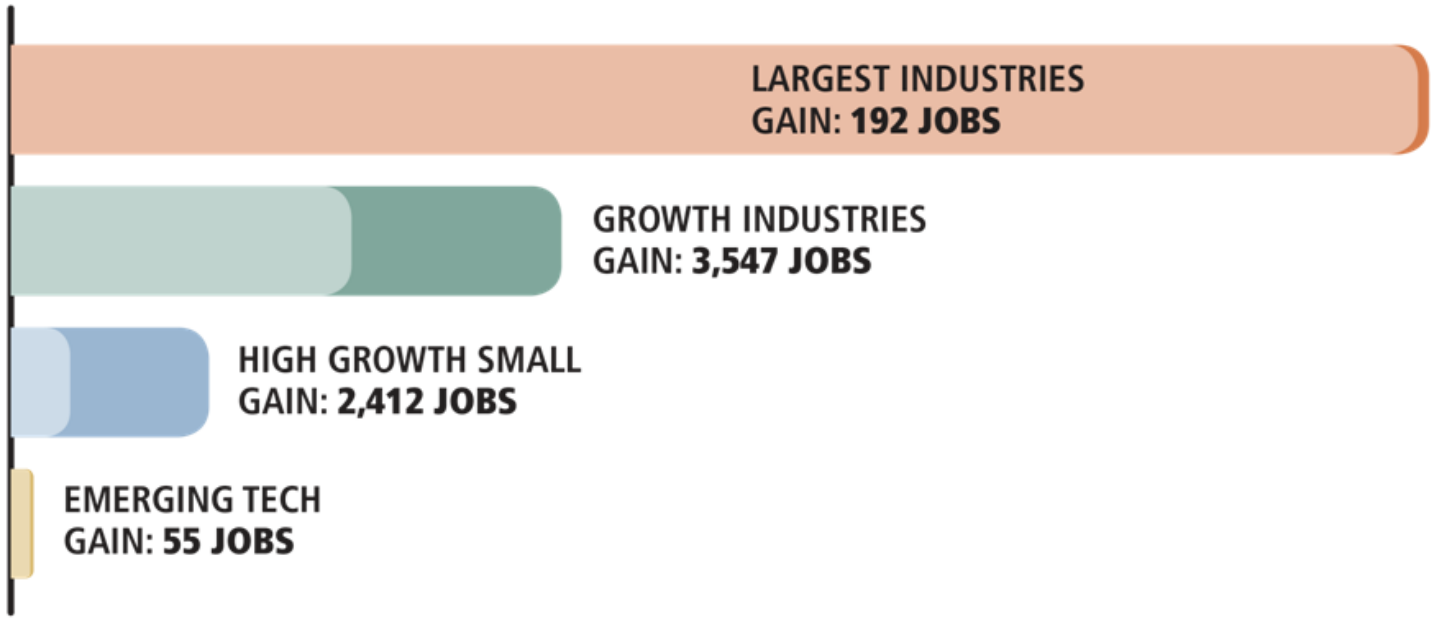


Total Jobs: 523,825

Colorado Employment in 2013 2008

Industry Group Comparison

Total Employment and 5-year Job Growth (Mesa County)



Location Quotients

Table includes industries with location quotients of 3 or greater. Location quotients measure the concentration of an industry in Mesa County versus the national average. Industries with location quotients of 1 or greater have an above average concentration in the county economy.

		Mesa County				Mesa County-2013			Projected Annual	
		Employment		Growth 2008-13				Location	U.S. Growth 2012-2022	
NAICS	Description	2008	2013	Absolute	Percent	Firms	Avg Wage	Quotient*	Employment	Output
	Energy and Mining									
213111	Drilling oil and gas wells	871	354	-517	-59%	13	$93,765	8.58	1.9%	2.1%
213112	Support activities for oil and gas operations	2,839	2179	-660	-23%	188	$71,131	17.29	1.9%	2.1%
213113	Support activities for coal mining	6	25	19	289%	3	$100,090	6.11	1.9%	2.1%
	Food and Beverages									
311330	Confectionery mfg. from purchased chocolate	47	91	44	94%	1	$38,273	6.49	-2.2%	1.6%
312130	Wineries	99	92	-7	-7%	10	$21,904	4.54	-0.1%	0.8%
312140	Distilleries	3	49	46	1707%	2	$11,326	13.68	-0.1%	0.8%
	Textiles									
313221	Narrow fabric mills	0	67	67	6747%	1	$41,484	19.88	-2.4%	-0.8%
314991	Rope, cordage, and twine mills	57	155	99	174%	1	$32,049	93.69	-2.4%	-0.8%
315991	Hat, cap, and millinery manufacturing	6	7	1	17%	1	$23,770	3.83	-8.3%	-0.6%
	Plastic Products									
325991	Custom compounding of purchased resins	56	32	-24	-43%	1	$64,296	4.41	-1.7%	3.5%
326122	Plastics pipe and pipe fitting manufacturing	42	42	-1	-2%	1	$49,017	3.48	-0.8%	1.8%
	Non-Metal Mineral Products									
327113	Porcelain electrical supply manufacturing	142	98	-44	-31%	1	$46,212	41.15	0.9%	2.8%
327320	Ready-mix concrete manufacturing	61	135	74	122%	1	$44,764	3.72	3.1%	3.6%
327332	Concrete pipe manufacturing	67	21	-46	-69%	1	$36,498	6.44	3.1%	3.6%
327993	Mineral wool manufacturing	92	73	-19	-20%	1	$45,672	10.50	-0.1%	3.3%
327999	Miscellaneous nonmetallic mineral products	15	22	6	42%	1	$35,412	4.34	-0.1%	3.3%

		Mesa County				Mesa County-2013			Projected Annual	
		Employment		Growth 2008-13				Location	U.S. Growth 2012-2022	
NAICS	Description	2008	2013	Absolute	Percent	Firms	Avg Wage	Quotient*	Employment	Output
	Industrial Machinery									
333131	Mining machinery and equipment manufacturing	17	62	45	270%	2	$54,393	9.93	-0.9%	1.7%
333295	Semiconductor machinery manufacturing	26	40	14	52%	1	$56,991	5.55	-0.7%	2.1%
333412	Industrial and commercial fan and blower mfg.	37	86	49	132%	1	$55,443	17.15	-0.3%	2.8%
333999	Miscellaneous general purpose machinery mfg.	63	89	26	42%	1	$67,643	5.06	-0.6%	3.6%
423810	Construction and Mining (except Oil Well) Machinery Wholesalers	271	219	-52	-19%	14	$61,589	6.17	0.8%	3.7%
	Instruments									
334514	Totalizing fluid meters and counting devices	104	25	-78	-76%	1	$57,964	5.37	-0.9%	3.0%
334519	Other measuring and controlling device mfg.	30	74	44	148%	3	$59,985	5.34	-0.9%	3.0%
	Recreation Equipment									
336991	Motorcycle, bicycle, and parts manufacturing	17	49	32	195%	2	$17,340	9.46	0.4%	3.5%
441210	Recreational vehicle dealers	57	56	-1	-2%	4	$46,912	4.09	0.7%	3.2%
441222	Boat dealers	65	46	-19	-29%	2	$34,538	3.27	0.7%	3.2%
451110	Sporting goods stores	254	381	127	50%	21	$22,486	3.31	0.7%	3.2%
	Ordnance and Explosives									
325920	Explosives manufacturing	0	9	9	907%	1	$71,617	3.06	-1.7%	3.5%
332995	Other ordnance and accessories manufacturing	165	214	49	29%	1	$44,534	84.96	0.7%	2.5%
	Other Manufacturing									
321992	Prefabricated wood building manufacturing	42	29	-12	-30%	2	$29,327	5.26	1.1%	3.6%
323119	Other commercial printing	13	54	41	322%	3	$44,956	3.26	-0.6%	1.2%
332611	Spring, heavy gauge, manufacturing	7	11	4	55%	1	$34,565	5.90	-2.9%	3.7%
	Transportation Services									
484110	General freight trucking, local	165	322	157	95%	25	$49,542	3.30	0.9%	2.9%
484220	Other specialized trucking, local	487	376	-111	-23%	52	$48,664	4.00	0.9%	2.9%
484230	Other specialized trucking, long-distance	138	169	31	22%	17	$76,886	3.17	0.9%	2.9%
488111	Air traffic control	8	7	-1	-11%	1	$32,765	6.00	1.8%	2.9%
488190	Other support activities for air transport.	349	378	30	9%	5	$58,724	8.85	1.8%	2.9%

		Mesa County				Mesa County-2013			Projected Annual	
		Employment		Growth 2008-13				Location	U.S. Growth 2012-2022	
NAICS	Description	2008	2013	Absolute	Percent	Firms	Avg Wage	Quotient*	Employment	Output
	Tourism									
713120	Amusement arcades	6	40	34	594%	0	$10,985	4.80	1.1%	1.9%
713920	Skiing facilities	2	151	149	7543%	1	$12,773	9.73	1.1%	1.9%
721191	Bed-and-breakfast inns	1	47	46	3397%	1	$13,418	6.88	1.0%	2.5%
487990	Scenic and sightseeing transportation, other	5	23	18	358%	2	$14,369	18.79	1.8%	2.9%
561599	All other travel arrangement services	298	123	-175	-59%	4	$50,540	3.62	-1.2%	2.5%
812331	Linen supply	199	185	-14	-7%	2	$27,661	5.92	0.5%	2.1%
	Business Support Services									
532412	Other heavy machinery rental and leasing	169	155	-14	-8%	15	$81,937	5.56	2.4%	3.5%
532490	Other machinery rental and leasing	29	78	49	169%	10	$51,034	3.36	2.4%	3.5%
541370	Other surveying and mapping services	162	66	-96	-59%	15	$55,931	3.58	1.9%	3.9%
541620	Environmental consulting services	98	176	78	80%	21	$60,076	4.90	3.5%	3.3%
562910	Remediation services	69	143	74	107%	6	$62,371	4.24	2.0%	1.9%
561990	All other support services	259	327	68	26%	17	$30,362	3.76	1.4%	2.7%
561422	Telemarketing bureaus	24	704	680	2883%	4	$14,965	3.81	1.7%	1.9%
	Health Care and Social Services									
532291	Home health equipment rental	60	57	-3	-5%	8	$45,799	3.31	1.6%	2.9%
623312	Homes for the elderly	256	612	356	139%	18	$20,241	3.73	2.2%	3.0%
624229	Other community housing services	23	42	19	84%	1	$23,915	3.12	0.9%	2.7%

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High Growth Industries – Colorado

		State of Colorado				Projected Annual	
		Employment		Growth 2008-13		U.S. Growth 2012-2022	
NAICS	Description	2008	2013	Absolute	Percent	Employment	Output
	Energy, Mining and Utilities						
221112	Fossil fuel electric power generation	14	577	563	4021%	-1.2%	2.5%
221122	Electric power distribution	143	5,359	5,216	3647%	-1.2%	2.5%
221210	Natural gas distribution	71	831	760	1070%	-1.7%	1.8%
212299	All other metal ore mining	463	956	492	106%	-0.8%	2.5%
	Food Processing						
311811	Retail bakeries	788	1,330	543	69%	-0.5%	1.5%
311412	Frozen specialty food manufacturing	218	500	282	129%	-1.2%	1.5%
311511	Fluid milk manufacturing	997	1,289	292	29%	-0.5%	1.8%
	Other Manufacturing						
331111	Iron and steel mills	538	1,324	786	146%	-1.7%	1.0%
334510	Electromedical apparatus manufacturing	2,828	3,267	439	16%	-0.9%	3.0%
326199	All other plastics product manufacturing	2,266	2,645	379	17%	-0.8%	1.8%
336414	Guided missile and space vehicle mfg.	5,414	5,715	300	6%	-0.6%	1.6%
	Industrial Machinery						
332710	Machine shops	3,843	4,249	406	11%	0.3%	3.2%
333611	Turbine and turbine generator set units mfg.	533	814	281	53%	-0.3%	3.6%
333618	Other engine equipment manufacturing	1,099	1,413	314	29%	-0.3%	3.6%
333995	Fluid power cylinder and actuator mfg.	0	266	266	26574%	-0.6%	3.6%
423830	Industrial Machinery and Equipment Wholesalers	4,397	4,698	301	7%	0.8%	3.7%

NAICS	Description	State of Colorado Employment 2008	State of Colorado Employment 2013	State of Colorado Growth 2008-13 Absolute	State of Colorado Growth 2008-13 Percent	Projected Annual U.S. Growth 2012-2022 Employment	Projected Annual U.S. Growth 2012-2022 Output
	Information Technology						
334220	Broadcast and wireless communications equipment mfg	375	1,218	843	225%	-3.3%	2.6%
517919	Other telecommunications	667	3,054	2,387	358%	-0.6%	3.4%
518210	Data processing and related services	6,357	8,142	1,785	28%	0.7%	4.7%
	Finance and Insurance Services						
522292	Real estate credit	5,294	6,319	1,025	19%	0.5%	3.4%
522320	Financial transaction processing and clearing	4,665	5,176	511	11%	0.5%	3.4%
523920	Portfolio management	4,665	5,863	1,198	26%	2.1%	4.7%
523930	Investment advice	2,248	2,909	661	29%	2.1%	4.7%
523999	Miscellaneous financial investment activities	612	1,721	1,109	181%	2.1%	4.7%
541191	Title abstract and settlement offices	971	2,585	1,614	166%	0.8%	1.9%
522390	Other credit intermediation activities	2,110	2,585	475	23%	0.5%	3.4%
522298	All other nondepository credit intermediation	1,062	1,358	296	28%	0.5%	3.4%
524114	Direct health and medical insurance carriers	3,478	3,869	391	11%	0.2%	2.2%
524292	Third party administration of insurance funds	1,266	1,524	258	20%	1.5%	2.6%
	Business Support and Professional Services						
541360	Geophysical surveying and mapping services	870	1,473	603	69%	1.9%	3.9%
541511	Custom computer programming services	15,915	19,467	3,552	22%	3.2%	4.8%
541613	Marketing consulting services	2,553	4,670	2,117	83%	3.5%	3.3%
541620	Environmental consulting services	2,560	3,177	617	24%	3.5%	3.3%
541690	Other technical consulting services	1,661	3,309	1,648	99%	3.5%	3.3%

National High Growth Industries

NAICS	Description	Mesa County Employment 2008	Mesa County Employment 2013	Historic Growth 2008-2013 Absolute	Historic Growth 2008-2013 Percent	Mesa County Firms	Mesa County Avg Wage	Projected Annual U.S. Growth 2012-2022 Employment	Projected Annual U.S. Growth 2012-2022 Output
High Output Growth									
334111	Electronic computer manufacturing	0	0	0	0%	0	$0	-2.9%	9.2%
334112	Computer storage device manufacturing	0	0	0	0%	0	$0	-2.9%	9.2%
334113	Computer terminal manufacturing	0	0	0	0%	0	$0	-2.9%	9.2%
334119	Other computer peripheral equipment mfg.	0	0	0	0%	0	$0	-2.9%	9.2%
511210	Software publishers	13	20	7	54%	5	$95,957	2.3%	5.7%
541511	Custom computer programming services	55	51	-4	-7%	17	$71,623	3.2%	4.8%
541512	Computer systems design services	85	125	40	47%	34	$64,866	3.2%	4.8%
541513	Computer facilities management services	0	2	2	168%	1	$65,488	3.2%	4.8%
541519	Other computer related services	0	0	0	32%	1	$92,003	3.2%	4.8%
518210	Data processing and related services	11	33	22	201%	8	$68,806	0.7%	4.7%
519110	News syndicates	0	0	0	0%	0	$0	0.7%	4.7%
519120	Libraries and archives	0	0	0	0%	0	$0	0.7%	4.7%
519130	Internet Publishing, Broadcasting, Search Portals	6	2	-4	-65%	2	$62,169	0.7%	4.7%
519190	Other information services	3	2	-1	-29%	1	$20,094	0.7%	4.7%
523110	Investment banking and securities dealing	1	3	2	153%	2	$126,893	2.1%	4.7%
523120	Securities brokerage	104	89	-15	-14%	22	$142,733	2.1%	4.7%
523130	Commodity contracts dealing	0	0	0	0%	0	$0	2.1%	4.7%
523140	Commodity contracts brokerage	0	0	0	0%	0	$0	2.1%	4.7%
523210	Securities and commodity exchanges	1	0	-1	-100%	0	$0	2.1%	4.7%
523910	Miscellaneous intermediation	13	2	-11	-84%	4	$47,929	2.1%	4.7%
523920	Portfolio management	2	19	17	963%	5	$50,669	2.1%	4.7%
523930	Investment advice	43	30	-13	-30%	23	$41,446	2.1%	4.7%
523991	Trust, fiduciary, and custody activities	0	0	0	0%	0	$0	2.1%	4.7%
523999	Miscellaneous financial investment activities	11	1	-10	-90%	1	$29,089	2.1%	4.7%
621610	Home health care services	386	466	80	21%	14	$42,273	4.8%	4.5%

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Emerging Tech Industries

		Mesa County				Mesa County-2013			Projected Annual	
		Employment		Growth 2008-13				Location	U.S. Growth 2012-2022	
NAICS	Description	2008	2013	Absolute	Percent	Firms	Avg Wage	Quotient*	Employment	Output
	Information Industries									
518210	Data processing and related services	11	33	22	201%	8	$68,806	0.29	0.7%	4.7%
519130	Internet Publishing, Broadcasting, Web Search Portals	6	2	-4	-65%	2	$62,169	0.04	0.7%	4.7%
519190	Other information services	3	2	-1	-29%	1	$20,094	0.39	0.7%	4.7%
	Computer Related Services									
541511	Custom computer programming services	55	51	-4	-7%	17	$71,623	0.16	3.2%	4.8%
541512	Computer systems design services	85	125	40	47%	34	$64,866	0.37	3.2%	4.8%
541513	Computer facilities management services	0	2	2	168%	1	$65,488	0.07	3.2%	4.8%
541519	Other computer related services	0	0	0	32%	1	$92,003	0.01	3.2%	4.8%
	Professional Technical Services									
541690	Other technical consulting services	110	108	-2	-2%	66	$62,656	1.27	3.5%	3.3%
541990	All other professional and technical services	13	26	13	100%	17	$66,483	0.57	2.2%	2.8%
	Other Research and Development									
541380	Testing laboratories	16	18	2	13%	8	$26,601	0.25	1.9%	3.9%
541711	Biotechnology research and development	2	0	-2	-87%	1	$118,890	0.00	1.3%	1.7%
541712	Physical and engineering research	37	26	-11	-30%	5	$131,544	0.13	1.3%	1.7%
541720	Social science and humanities research	1	0	-1	-100%	0	$0	0.00	1.3%	1.7%

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High Growth Small Industries

Includes basic industries have at least 25 employees in 2013 and have grown by 50% or more in the past five years.

		Mesa County				Mesa County-2013			Projected Annual	
		Employment		Growth 2008-13				Location	U.S. Growth 2012-2022	
NAICS	Description	2008	2013	Absolute	Percent	Firms	Avg Wage	Quotient*	Employment	Output
	Energy									
213113	Support activities for coal mining	6	25	19	289%	3	$100,090	6.11	1.9%	2.1%
	Food and Beverages									
311330	Confectionery mfg. from purchased chocolate	47	91	44	94%	1	$38,273	6.49	-2.2%	1.6%
312140	Distilleries	3	49	46	1707%	2	$11,326	13.68	-0.1%	0.8%
	Textiles									
313221	Narrow fabric mills	0	67	67	6747%	1	$41,484	19.88	-2.4%	-0.8%
314991	Rope, cordage, and twine mills	57	155	99	174%	1	$32,049	93.69	-2.4%	-0.8%
	Printing									
323113	Commercial screen printing	13	28	15	120%	1	$25,662	0.98	-0.6%	1.2%
323119	Other commercial printing	13	54	41	322%	3	$44,956	3.26	-0.6%	1.2%
	Machinery Manufacturing									
333131	Mining machinery and equipment manufacturing	17	62	45	270%	2	$54,393	9.93	-0.9%	1.7%
333295	Semiconductor machinery manufacturing	26	40	14	52%	1	$56,991	5.55	-0.7%	2.1%
333412	Industrial and commercial fan and blower mfg.	37	86	49	132%	1	$55,443	17.15	-0.3%	2.8%
	Other Manufacturing									
326199	All other plastics product manufacturing	25	136	111	444%	6	$47,188	1.16	-0.8%	1.8%
327320	Ready-mix concrete manufacturing	61	135	74	122%	1	$44,764	3.72	3.1%	3.6%
332323	Ornamental and architectural metal work mfg.	7	25	18	281%	2	$43,740	1.63	1.9%	3.1%
334519	Other measuring and controlling device mfg.	30	74	44	148%	3	$59,985	5.34	-0.9%	3.0%
336413	Other aircraft parts and equipment	5	119	114	2111%	1	$49,577	2.54	-0.6%	1.6%
336991	Motorcycle, bicycle, and parts manufacturing	17	49	32	195%	2	$17,340	9.46	0.4%	3.5%

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Existing Business Sizes

76% Businesses have less than 10 employees

			Number of establishments by employment size								
NAICS	NAICS Description	Total Establishments	1-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000 or more
11----	Agriculture, forestry, fishing and hunting	7	6	0	0	1	0	0	0	0	0
21----	Mining, quarrying, and oil and gas extraction	167	106	18	15	15	10	1	2	0	0
22----	Utilities	12	8	1	1	1	1	0	0	0	0
23----	Construction	503	350	64	50	25	9	5	0	0	0
31----	Manufacturing	160	75	32	26	15	7	5	0	0	0
42----	Wholesale trade	262	131	52	47	24	7	1	0	0	0
44----	Retail trade	605	250	169	105	51	16	12	2	0	0
48----	Transportation and warehousing	215	128	34	24	19	7	2	1	0	0
51----	Information	59	30	6	8	10	3	2	0	0	0
52----	Finance and insurance	231	154	40	20	15	1	0	1	0	0
53----	Real estate and rental and leasing	254	196	38	14	4	2	0	0	0	0
54----	Professional, scientific, and technical services	561	438	73	31	14	2	3	0	0	0
55----	Management of companies and enterprises	15	10	2	2	0	1	0	0	0	0
56----	Administrative and support and waste management	230	145	37	22	15	7	3	1	0	0
61----	Educational services	41	25	6	2	5	3	0	0	0	0
62----	Health care and social assistance	433	209	91	64	41	11	12	2	2	1
71----	Arts, entertainment, and recreation	54	30	8	7	3	5	0	1	0	0
72----	Accommodation and food services	303	71	54	69	83	22	4	0	0	0
81----	Other services (except public	392	231	101	45	13	1	1	0	0	0
99----	Industries not classified	2	2	0	0	0	0	0	0	0	0
	Total All Industries	4,506	2,595	826	552	354	115	51	10	2	1
	Distribution		58%	18%	12%	8%	3%	1%	0%	0%	0%

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Grand Junction and Mesa County have the leadership, vision, talent, engaged and committed business community to create a vibrant community attractive to businesses, talent, visitors, students and families who crave a western outdoor lifestyle.

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About the Project Team

Chabin Concepts and DSG were part of the Grand Junction/Mesa County BrandPrint Project and Team.

Chabin Concepts is an economic development and marketing firm with core competencies is in realistic, achievable and measurable actions.DSG is an independent Site Selection Consultant. Our goal is to assist cities, counties, regions and states with their readiness for new investment and position them to win new jobs and investment. Our approach engages the community and leadership in strategic thinking **and** tactical implementation ***accomplish the mission*.**

Audrey Taylor, President and CEO, Chabin Concepts

With over 35 years experience, Audrey has assisted over 350 communities with strategic economic development action plans in California, Colorado, Oregon, Washington, Texas, Nevada, New Mexico, Oklahoma, Hawaii and Alaska. Best known for her strategic thinking, she has also assisted companies such as 3M, Graphic Packaging International, Sony, Spectra-Physics, Joy Signal, Rio Pluma, and NCI Building in strategic location analysis.

She has served five California Governors in different capacities, recognized as Woman of Year twice by the state and received prestigious Golden Bear award for her passion, commitment and dedication for giving back to the economic development profession.

Don Schjeldahl, CEO, DSG

For more than 32 years Don has assisted companies such as Avon, Amy's Kitchen and Colgate Palmolive in developing and implementing location strategies for office operations, manufacturing plants, and distribution facilities. Don has located client facilities in both urban centers and rural areas throughout the United States, Canada, Mexico and Europe.

Don is a frequent author on location strategy and industry insights and he a Founding Member of the Site Selection Guild. Using his most recent facility location, Sierra Nevada Brewery's east coast expansion in Asheville, North Carolina, Don assist both craft brewers with growth and location strategies and communities with positioning to locate/grow craft brewing in their community.

Don is known for his straight-talk. He partners with Chabin Concepts on Competitive Location Assessments for communities to enhance their opportunities for attracting new facility locations. don@donschjeldahlgroup.com, 828-772-9374