



2018 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

ABOUT THE CEDS:

The Central Arizona Governments Comprehensive Economic Development Strategy (CEDS) is used for regional economic development planning as well as the identification of projects to be eligible for funding from the Economic Development Administration.



Annual Update



Five Year Update



For further information:



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www.cagaz.org

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INTRODUCTION

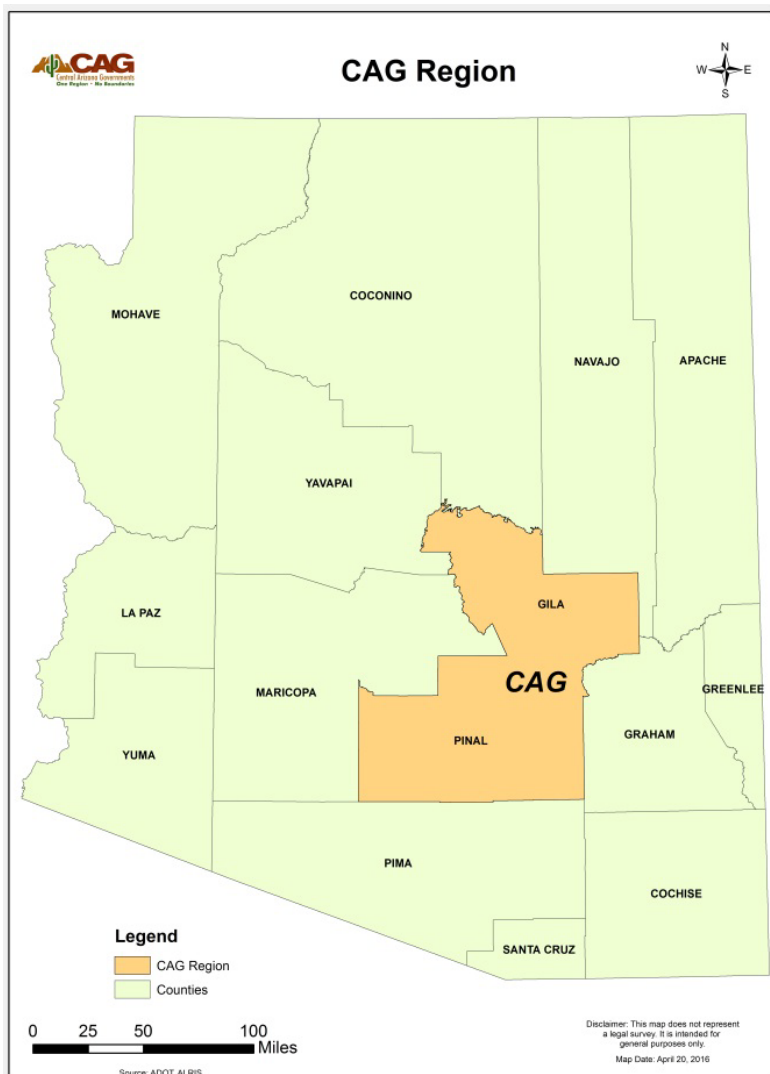
The Central Arizona Governments (CAG) is one of six planning regions within the State of Arizona and was incorporated under the statutes of the State of Arizona on July 31, 1975, as a private, non-profit corporation. Upon incorporation, the governmental entities within Gila and Pinal Counties together comprised the following mission statement:

- Encourage and permit local units of government to join and cooperate with one another to improve the health, safety and general welfare of their citizens and to plan for the future development of the region, and
- Develop and implement constructive and workable policies and programs for meeting and solving the region-wide problems of local government.

CAG provides regional planning services in transportation, economic development, Community Development Block Grant (CDBG), environmental planning, workforce training, information services, and public facilitation.

CAG was designated by the U.S. Department of Commerce as an Economic Development District (EDD) in 1994.

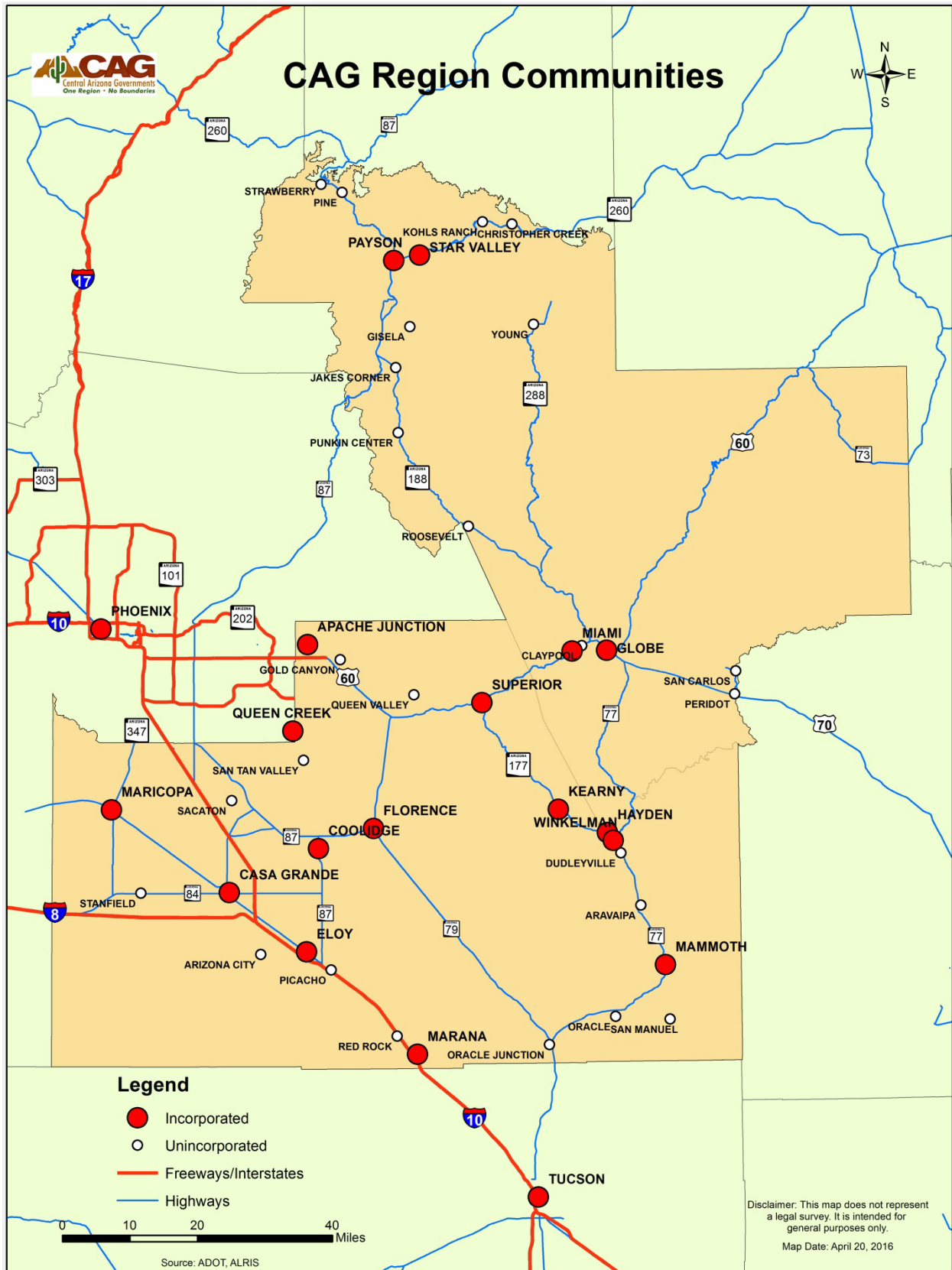
Map 1: CAG Region



The EDD serves CAG’s entire region, which includes two Counties, 17 incorporated governments and four Indian Communities. Municipalities include Globe, Hayden, Miami, Payson, Star Valley, and Winkelman in Gila County, and Apache Junction, Casa Grande, Coolidge, Eloy, Florence, Kearny, Mammoth, Marana, Maricopa, Queen Creek, and Superior in Pinal County. Native American Indian Community members include the San Carlos Apache Tribe and the White Mountain Apache Tribe in Gila County, and the Ak-Chin and Gila River Indian Communities in Pinal County.

The EDA developed the CEDS Program as a means of evaluating and quantifying Districts across the country. The purpose of a CEDS is to assist EDA and the EDD in establishing regional priorities for projects and investments. A CEDS is intended to promote economic development and opportunity, to foster effective transportation systems, to enhance and protect the environment, and to balance resources through sound management of development.

Map 2: CAG Communities



This year's CEDS is a 5-year update and has been created in cooperation with CAG's CEDS Committee and EDD Board. A listing of the CEDS Committee and EDD Board members are identified in Tables 1 and 2.

Table 1: CAG CEDS Committee Members

City of Apache Junction	Elan Vallender (Chair)	Town of Hayden	Vacant
Town of Payson	Bobby Davis (Vice-Chair)	Town of Kearny	Vacant
Ak-Chin Indian Community	Vacant	Town of Mammoth	Vacant
APS	Vacant	Town of Marana	Curt Woody
Central Arizona College	Evelyn Casuga	City of Maricopa	Denyse Airheart
City of Casa Grande	Richard Wilkie	Town of Miami	Vacant
City of Coolidge	Rick Miller	Northern Gila County Economic Development Corporation	Vacant
Copper Corridor Economic Development Coalition	Bill Bolin	Pinal County	Tim Kanavel
Town of Winkelman	Sylvia Kerlock	Pinal Partnership	Sandie Smith
City of Eloy	Jon Vlaming	Town of Queen Creek	Marissa Garnett
Town of Florence	Jennifer Evans	Salt River Project/North East Pinal Economic Partnership	Caryn Sanchez
Resolution Copper	Melissa Rabago	San Carlos Apache Tribe	Vacant
Gila County	James Menlove	Southern Gila County Economic Development Corporation	Karalea Cox
Gila River Indian Community	Vacant	Town of Superior	Vacant
City of Globe	Linda Oddonetto	Western Bank	Terry Strain

The CAG Comprehensive Economic Development Strategy (CEDS) Committee is made up of private and public sector representation from the region.

The CAG Economic Development District Board is made up of representation from CAG’s Regional Council and other appointees from throughout the region. The EDD Board approves the final draft of the CEDS for submission to the Economic Development Administration.

Table 2: CAG Economic Development District Board

Name	Representing
Chairman Robert Miguel	Ak-Chin Indian Community
Mayor Jeff Serdy	Apache Junction
Mayor Craig McFarland	Casa Grande
Mayor Jon Thompson	Coolidge
Mayor Joel Belloc	Eloy
Mayor Tara Walter	Florence
Supervisor Tim Humphrey	Gila County
Governor Stephen Roe Lewis	Gila River Indian Community
Mayor Al Gameros	Globe
Mayor Bobby Smith	Hayden
Mayor Debra Sommers	Kearny
Mayor Joe Dietz	Mammoth
Mayor Ed Honea	Marana
Mayor Christian Price	Maricopa
Mayor Darryl Dalley	Miami
Karalea Cox	Southern Gila County EDC
Mayor Craig Smartwood	Payson
Supervisor Peter Rios	Pinal County
Councilmember Robin Benning	Queen Creek
Don Breiland	Salt River Project
Chairman Terry Rambler	San Carlos Apache Tribe
Mayor Ronnie McDaniel	Star Valley
Mayor Mila Besich-Lira	Superior
Mayor Louis Brocamonte	Winkelman
Chairman Ronnie Lupe	White Mountain Apache Tribe

SUMMARY BACKGROUND

DEMOGRAPHIC AND SOCIOECONOMIC PROFILE

Since 2000, the CAG Region has grown significantly and is projected to continue to grow. Pinal County is experiencing the majority of the growth. Over a 25-year period from 2000 to 2025, the CAG Region is projected to increase in population by 151 percent. This growth requires careful planning to meet the needs of residents, employers, and the workforce. With this growth, the CAG Region is poised to capitalize on the economic potential of a greater population, providing opportunities for new jobs, businesses, and services. Targeting sectors that will enhance existing industries and grow emerging industries will be key to the success of the region.

CAG’s population centers are located along major transportation routes within the region. The Interstate-10 corridor in western Pinal County provides the majority of the urban development within the region. CAG’s two largest communities, Casa Grande and Maricopa, lie within a short distance of Interstate 10. The other regional population centers of significance include Apache Junction, Payson, Globe-Miami, and an unincorporated portion of Pinal County called San Tan Valley.

Table 3: CAG Region Population

Geography	Population Estimates								
	2000	2010	2011	2012	2013	2014	2015	2016	2025 Estimate
Gila County, Arizona	51,355	53,544	53,473	53,031	53,025	53,139	53,159	54,333	55,416
Pinal County, Arizona	181,283	379,384	378,044	382,349	385,360	396,521	406,584	413,312	527,859
CAG Region, Arizona	232,638	429,367	432,928	431,517	435,380	438,385	449,660	467,645	583,275

Source: U.S. Census Bureau, Population Division; Arizona Office of Economic Opportunity

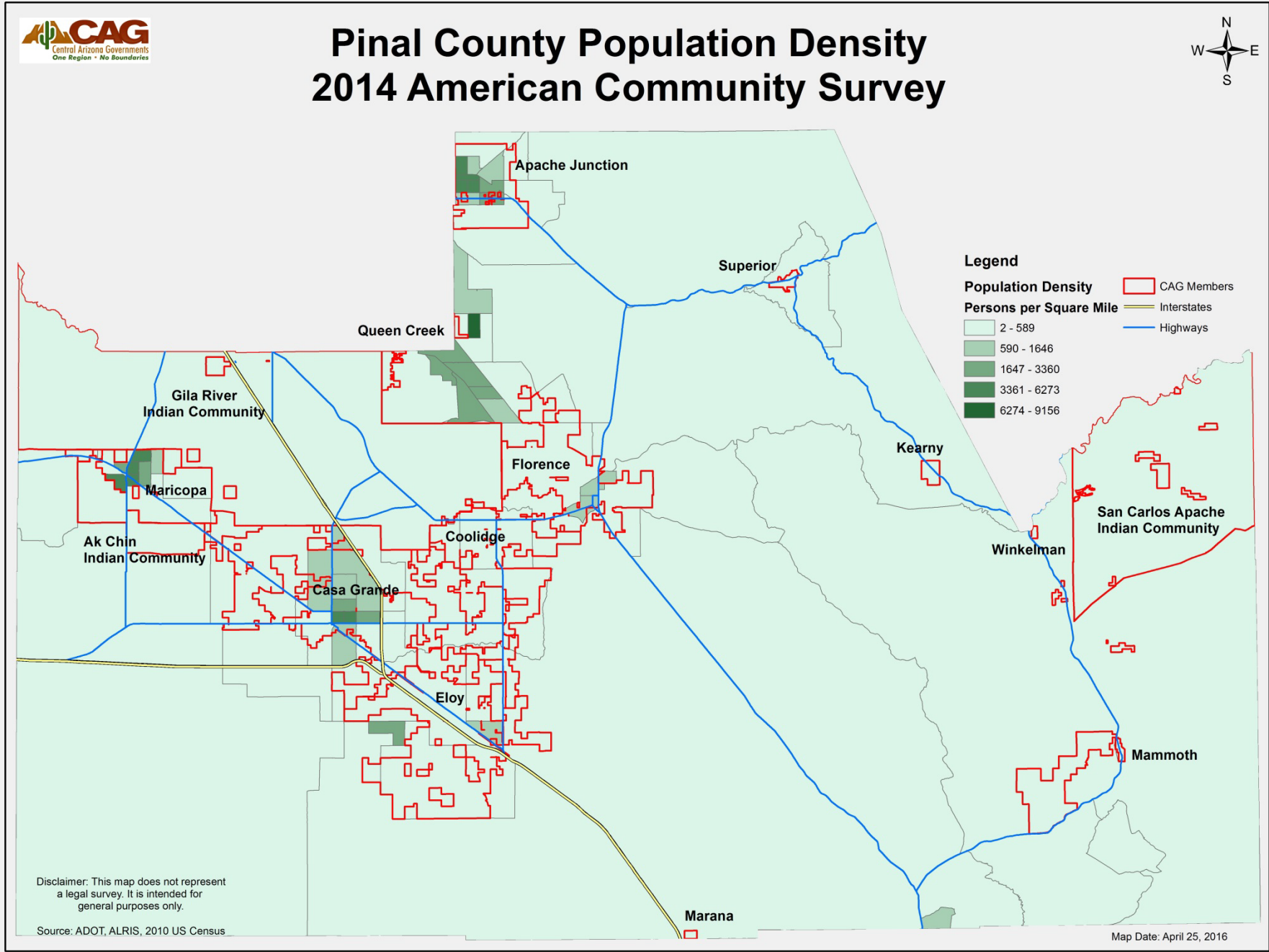
Table 4: CAG Region Income and Poverty

2015 Measure	United States	Gila County, Arizona	Pinal County, Arizona
Per capita income (dollars)	\$28,930	\$20,583	\$21,130
Per Capita Income as Percentage of U.S.		71.1%%	73.0%
Median household income (dollars)	\$53,482	\$40,042	\$50,248
Median Household Income as Percentage of U.S.		73.8%	91.2%
Percentage of Families in Poverty	11.3%	15.2%	12.0%

Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

Both Gila and Pinal counties are below the U.S. average in per capita income by 29 and 27 percent. Median household incomes are 9 percent below the U.S. average in Pinal County, and Gila County is approximately 26 percent lower than the U.S. Average. The rural areas of Pinal and the majority of Gila County are in need of attention for economic growth and personal wealth building.

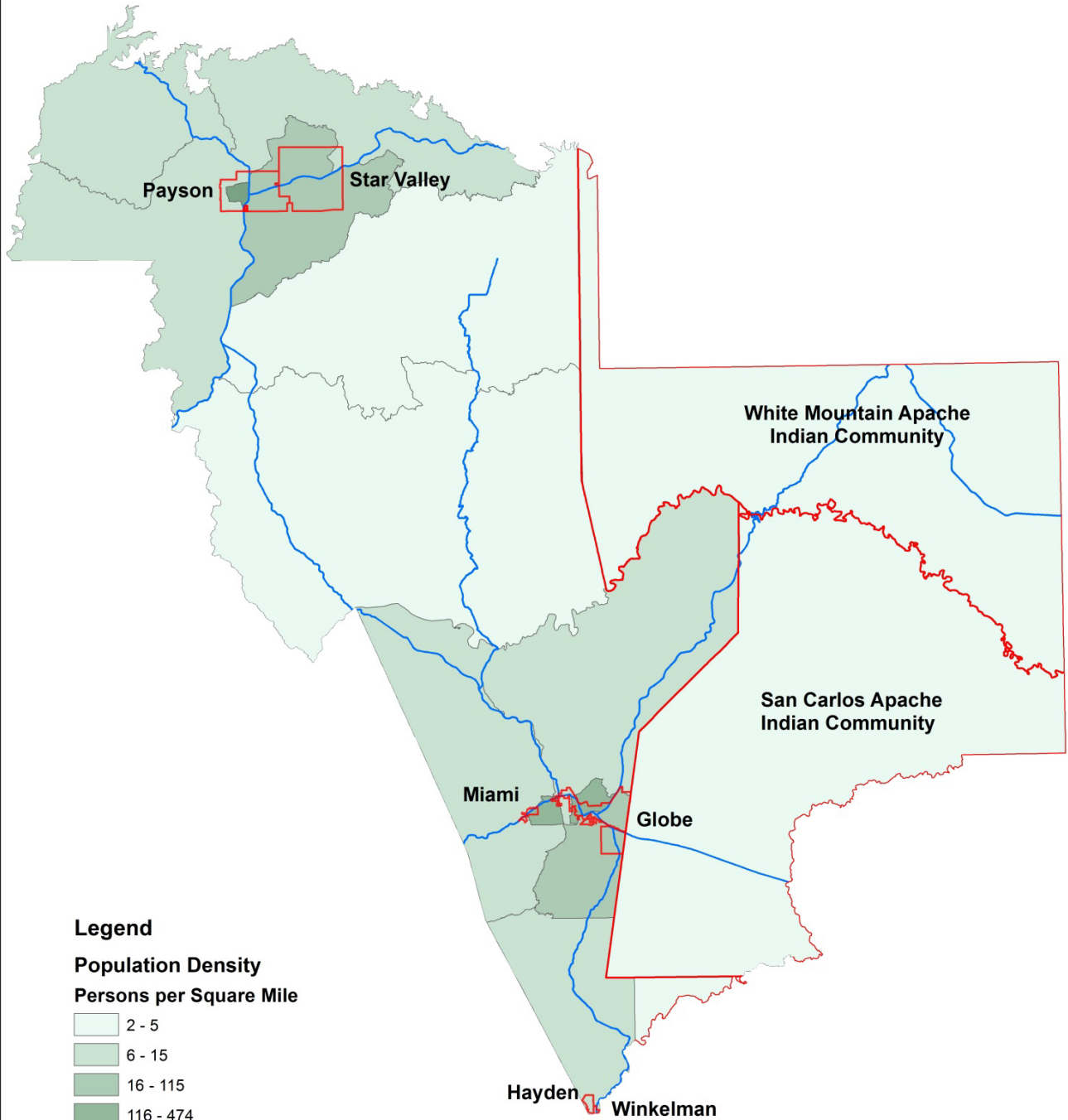
Map 3: Pinal County Population Density



Map 4: Gila County Population Density



Gila County Population Density 2014 American Community Survey



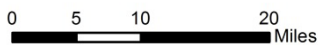
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Population Density Persons per Square Mile

- 2 - 5
- 6 - 15
- 16 - 115
- 116 - 474
- 475 - 1835

CAG Members

State Highways



Source: ADOT, ALRIS, 2010 US Census

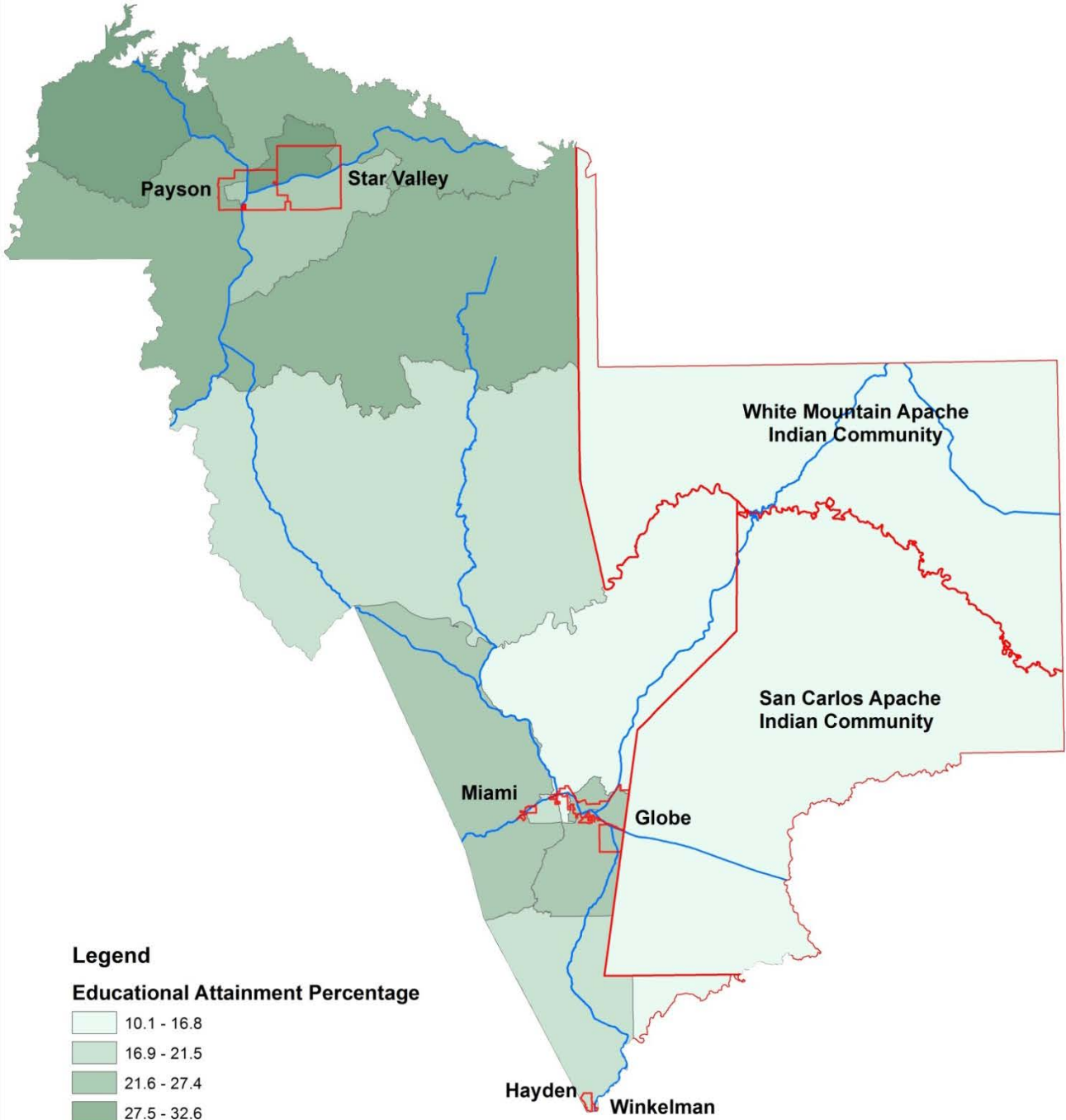
Disclaimer: This map does not represent a legal survey. It is intended for general purposes only.

Map Date: April 25, 2016

Map 5: Gila County Educational Attainment - College Degree



Gila County Educational Attainment Percentage College/University Degree



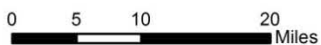
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Educational Attainment Percentage

- 10.1 - 16.8
- 16.9 - 21.5
- 21.6 - 27.4
- 27.5 - 32.6
- 32.7 - 41.7

CAG Members

State Highways



Source: ADOT, ALRIS, 2010 US Census

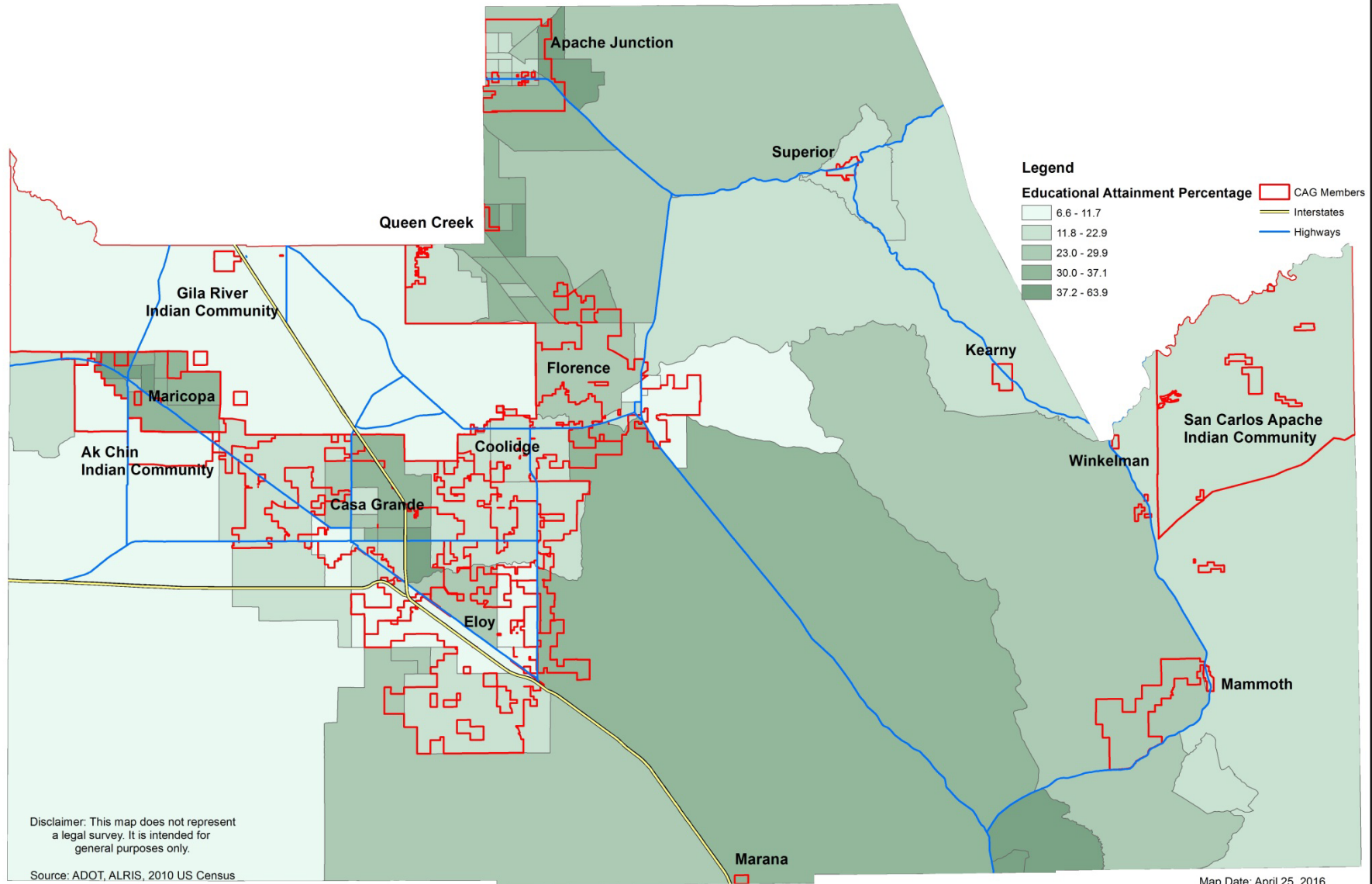
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Map Date: April 25, 2016

Map 6: Pinal County Educational Attainment - College Degree



Pinal County Educational Attainment College/University Degree



EDUCATION

Educational attainment in the region follows the population patterns with a few exceptions. The urban areas of the region tend to have the highest educational attainment levels, while rural areas experience a lower rate. Rural areas with mining operations have higher educational attainment due to the advanced degrees in engineering, geology, and other mining technologies. There are minor differences between Gila and Pinal Counties, but the general trend is that these counties provide an indication of lower population rates of individuals attaining a Bachelor’s Degree, or Graduate Degree I comparison with the U.S. average.

Table 5: Educational Attainment, 25 Years and Older

Educational Attainment	U.S.	Gila County	Pinal County
Population 25 years and over	211,462,522	38,397	261,865
Less than 9th grade	5.7%	4.6%	5.8%
9th to 12th grade, no diploma	7.6%	11.4%	9.2%
High school graduate (includes equivalency)	27.8%	30.0%	30.1%
Some college, no degree	21.1%	28.4%	27.7%
Associate's degree	8.1%	8.9%	9.2%
Bachelor's degree	18.5%	9.7%	11.7%
Graduate or professional degree	11.2%	7.0%	6.3%

Source: 2011-2015 American Community Survey 5-Year Estimates

There are several institutions of higher learning within the CAG Region. The Central Arizona College has five campuses and three centers throughout Pinal County, providing opportunities for Associate’s Degrees and certificates in business, science, and the arts. Gila Community College, in partnership with Eastern Arizona College, has three campuses throughout Gila County and also provides Associate’s Degrees in business, science, and the arts. Each community college provides partnerships with Arizona universities for Bachelor’s Degree tracks.

The University of Arizona in Tucson lies to the south of the CAG Region, while Arizona State University lies to the northwest in the City of Tempe. Both universities are large, offering a myriad of programs and degrees, and allowing the regional workforce to become trained in a variety of fields. There are also a variety of for-profit and religious institutions within close proximity to the CAG Region. All of these options provide a strong network for workforce training within the region.

EMPLOYMENT

Employment in the CAG Region is driven by mining, agribusiness, and food processing; arts, and entertainment and recreation. These three sectors account for a majority of the employment in the region. Industries that have potential to grow in the region include these sectors, as well as defense and security, education and knowledge creation, biomedical/biotechnical, business services, distribution and e-commerce, and the chemical based product sector. Following are the employment figures and cluster analysis for the CAG Region.

Cluster analyses measure the saturation of employment or establishments (businesses) within a region. A location quotient of 1.00 indicates the national average for saturation. A location quotient of more than 1.00 indicates higher saturation; while numbers below 1.00 indicate saturation lower than the national average. For example, mining in the CAG Region has an employment location quotient of 29.39. This means that there is a hugely concentrated sector of employment in mining in the CAG Region. This is primarily due to copper mines and resources. The mining establishment location quotient is 5.67. This means there are more companies than what would be expected using the national average, but these companies are quite large when comparing them against the employment location quotient.

When considering lower saturation, transportation equipment manufacturing in the region has an employment location quotient of .07. This means that very few people in the region are employed in this sector when compared against the national average saturation.

Table 6: CAG Employment and Economic Clusters

Geography Name	Year	Description	QCEW Cluster - Establishments	Industry Cluster Establishment LQ	QCEW Cluster - Employment	Industry Cluster Employment LQ	QCEW Cluster - Wages	Industry Cluster Annual Wages LQ
CAG Region	2012	Electrical Equipment, Appliance & Component Mfg	1	0.45	8	0.05	\$359,572	0.05
CAG Region	2012	Mining	30	5.67	3,205	29.39	\$263,866,489	46.06
CAG Region	2012	Energy (Fossil & Renewable)	172	0.99	1641	0.52	\$66,847,892	0.34
CAG Region	2012	Fabricated Metal Product Mfg	15	0.65	198	0.3	\$7,726,933	0.29
CAG Region	2012	Printing & Publishing	63	0.77	718	0.65	\$34,626,963	0.6
CAG Region	2012	Forest & Wood Products	18	0.68	178	0.27	\$5,809,511	0.24
CAG Region	2012	Apparel & Textiles	13	0.48	86	0.25	\$4,465,386	0.35
CAG Region	2012	Arts, Entertainment, Recreation & Visitor Industries	158	1.39	2937	1.06	\$86,876,140	1.09
CAG Region	2012	Education & Knowledge Creation	54	0.96	3125	1.17	\$132,123,579	1.23
CAG Region	2012	Business & Financial Services	418	0.67	1634	0.26	\$85,759,238	0.2
CAG Region	2012	Machinery Mfg	4	0.62	32	0.09	\$2,124,119	0.12
CAG Region	2012	Glass & Ceramics	2	0.73	10	0.1	\$429,483	0.12
CAG Region	2012	Transportation Equipment Mfg	1	0.29	39	0.07	\$3,520,732	0.12
CAG Region	2012	Primary Metal Mfg	3	3	68	0.82	\$3,209,459	0.86
CAG Region	2012	Information Technology & Telecommunications	79	0.51	320	0.12	\$23,569,769	0.11
CAG Region	2012	Transportation & Logistics	111	1.17	923	0.43	\$40,383,167	0.49
CAG Region	2012	Computer & Electronic Product Mfg	4	0.54	575	1.05	\$54,030,496	1.27
CAG Region	2012	Advanced Materials	37	0.67	1218	0.54	\$88,737,705	0.67
CAG Region	2012	Agribusiness, Food Processing & Technology	208	3.51	3,409	2.12	\$132,619,495	2.71
CAG Region	2012	Chemicals & Chemical Based Products	43	1.57	1006	1	\$50,327,335	0.97
CAG Region	2012	Biomedical/Biotechnical (Life Sciences)	160	1.11	4942	0.64	\$221,668,188	0.74
CAG Region	2012	Defense & Security	127	0.84	5416	1.4	\$350,000,464	1.56
CAG Region	2012	Manufacturing Supercluster	28	0.58	920	0.35	\$70,971,309	0.5
CAG Region	2012	Total All Industries	3917	1	70324	1	\$2,703,824,403	1

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW) and Purdue Center for Regional Development (cluster definitions)

PHYSICAL CHARACTERISTICS

The CAG Region contains a total of 10,096 square miles. The region falls into three distinct elevations: low-lying desert, steep hills and mountains, and a distinct physical break to higher elevations. The CAG Region's physical characteristics directly affect its regional economic development. The Region has an exceptionally large geographic extent, which is further complicated by the variation in physical environment and land ownership. These combine to create distinct sub-regions throughout Gila and Pinal counties.

The Region falls into three distinct elevations: low-lying desert in most of western Pinal County, steep hills and mountains in eastern Pinal County and southern Gila County, and a distinct physical break to higher elevations – the Mogollon Rim – in northern Gila County.

Further, there are variations in soil types that limit physical development in large portions of the Region. In general, there are more developable soils in the western portions of the CAG Region.

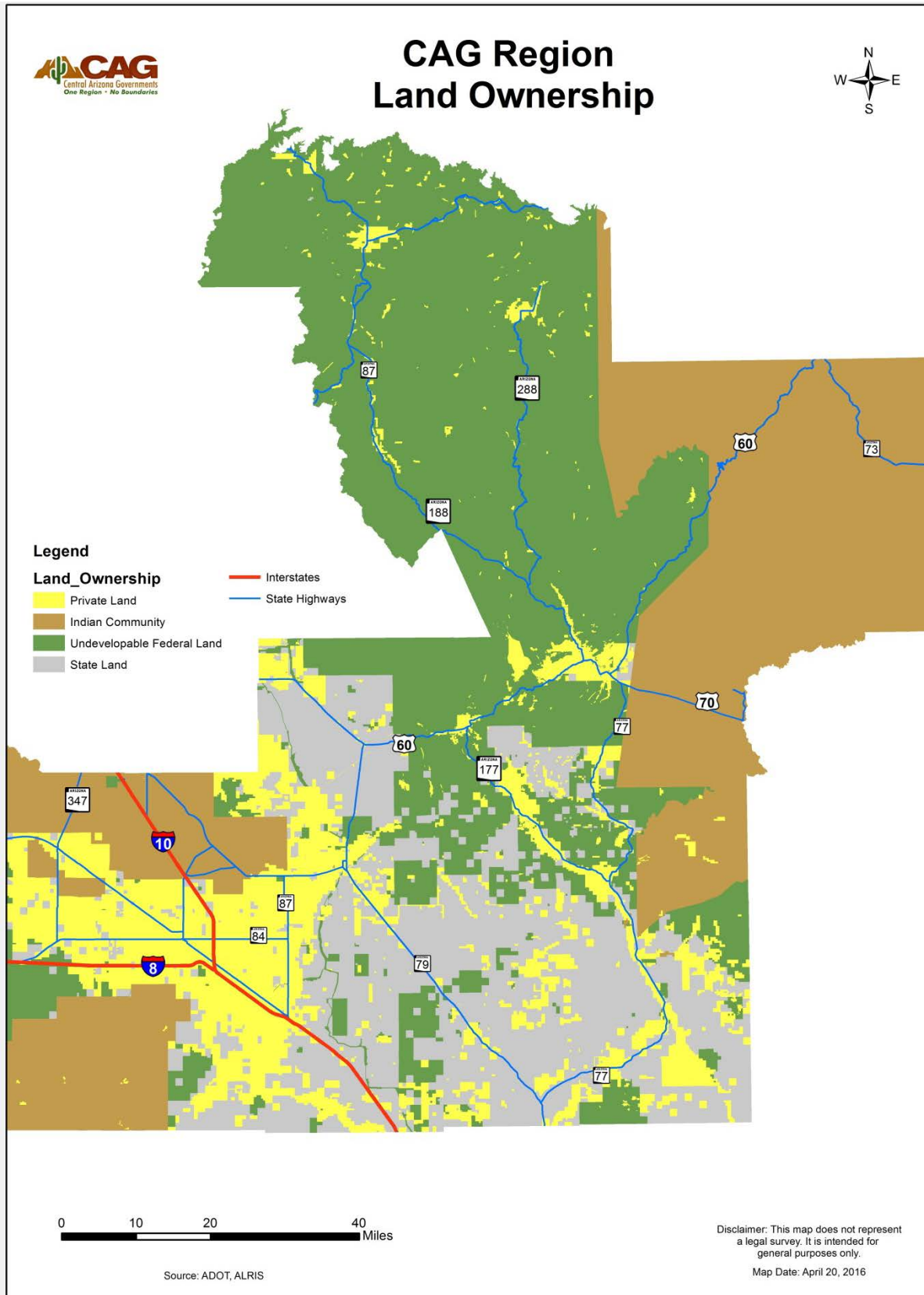
The majority of the southern portion of the region lies in the Basin and Range Province. This physiographic region is characterized by steep elevation changes and flat valleys. It covers much of the western United States and parts of Mexico (U.S. Geological Survey). This physiographic region is also associated with desert climates with associated flora and fauna.

The northern portion of the region lies within the physiographic region called the Arizona Transition Zone. This region serves as the bridge between the Basin and Range Province and the Colorado Plateau. The Arizona Transition Zone experiences a climb in elevation as it transitions into the Colorado Plateau (U.S. Geological Survey). The Mogollon Rim serves as the southern border of the Colorado Plateau, stretching for nearly 200 miles across eastern Arizona.

LAND OWNERSHIP

The pattern of land ownership is also a key contributing factor to the development of the region. Only 15 percent of the land in the region is privately owned, the other 85 percent is divided between Federal lands (37 percent); Native American Indian Communities (29 percent), and Arizona State Lands (19 percent). Opportunities for physical expansion for communities within eastern Pinal County and all of Gila County are limited, but opportunities exist to improve the local economies and quality of life.

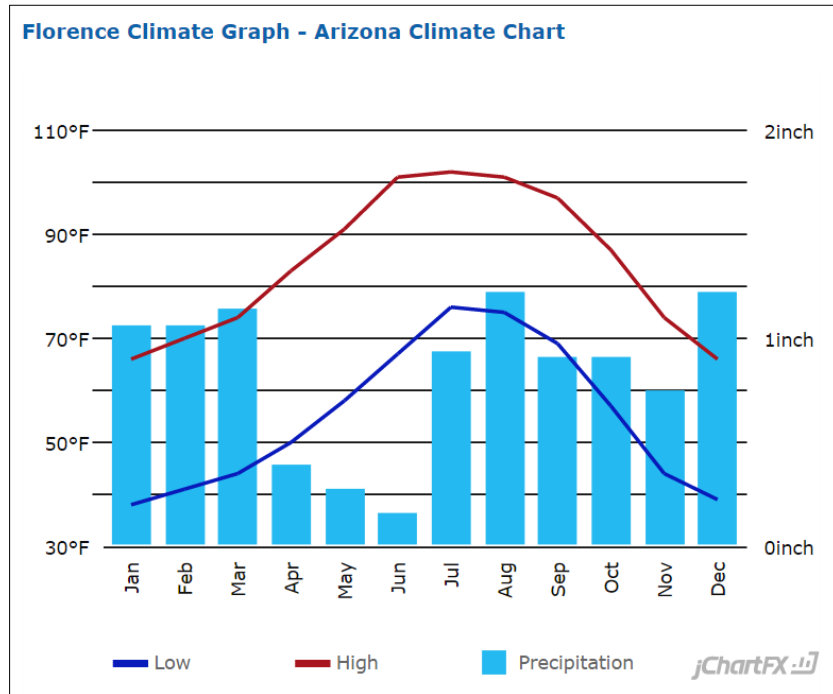
Map 7: Land Ownership



CLIMATE

The CAG Region is largely defined by low lying desert in the southwestern area, and the mountains to the north. Elevation plays a major role in central Arizona's climate, ranging from approximately 1,000 feet above sea level to nearly 8,000 feet. The county seat of Pinal County, the Town of Florence, averages 10 inches of rainfall per year. The average year-round high is 84 degrees Fahrenheit, and the average low is 55 degrees Fahrenheit. Summer averages climb to the low 100s during the day on average.

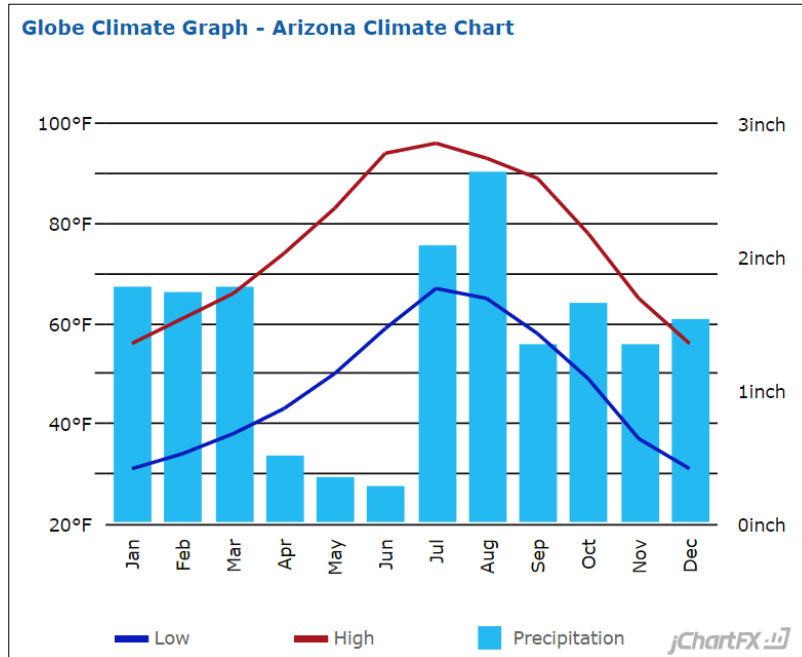
Figure 1: Pinal County Temperature and Precipitation



Source: usclimatedata.com

In contrast, the county seat of Gila County, the City of Globe, receives 17 inches of precipitation annually with average annual temperatures ranging between 47 and 76 degrees Fahrenheit. Northern Gila County experiences the coolest weather with average annual temperatures between 40 and 72 degrees, and precipitation at more than 21 inches. Some of that precipitation comes in the form of snow, with February averaging the most snow at six inches on average.

Figure 2: Gila County Temperature and Precipitation



Source: usclimatedata.com

The climate of the CAG Region plays a major role in winter visitors living in the region during the winter, and also supports tourism.

NATURAL AND CULTURAL RESOURCES

The CAG Region hosts a large amount of natural and cultural resources that are important to the overall quality of life, and tourism potential of the region. The region is home to a portion of the Sonoran Desert which supports unique flora and fauna, including the saguaro cactus which can only be found in the southwestern U.S. Although private land ownership is limited in certain areas of the region, the high amount of public lands provides opportunities for scenic views and outdoor recreation. Following is a list of Federal, state, and other open lands that contribute to the overall quality of life in the region:

- Sonoran Desert National Monument
- Tonto National Forest
- San Tan Mountain Regional Park
- Casa Grande Ruins National Monument
- Picacho Peak State Park
- Superstition Mountains
- Lost Dutchman State Park
- Tonto National Monument

These areas support a variety of activities ranging from hiking, bird watching, camping, and ATV trails, to other outdoor activities. Other natural amenities include the Gila River, Theodore Roosevelt Lake, and the many mountains that cover the regional landscape.

Cultural amenities are also abundant within the CAG Region. The Casa Grande Ruins host one of the largest prehistoric structures built in North America and attracts thousands of tourists each year. The area has also been defined by copper mining, being celebrated by some communities with an Ore Cart Trail where visitors can learn about copper as part of the region's heritage. Native American heritage is also prevalent in the region, with many sites named after this heritage. Arizona has been inhabited for over 10,000 years, and there are many unique opportunities to look back in time.

There are many trails within the CAG Region, most notably the Arizona Trail. The Arizona Trail stretches from northern Arizona all the way to the Mexican border to the south. It is estimated that there are more than 100,000 visitors that pass through the region on the Arizona Trail annually. This brings in-state and out-of-state visitors and spending potential for tourism-related businesses. Other trails, both motorized and non-motorized, are prevalent within the region at federal and state parks. This makes the region popular for outdoor recreation.

Figure 3: Arizona Trail



Source: aztrails.org

INFRASTRUCTURE

Transportation

The CAG Region has developed along transportation corridors, with the Interstate 8, Interstate 10 and US 60 corridors serving the main population centers for the region. Additional highways, such as US 87 and State Routes 77, 188, and 287 connect much of the remaining population centers. Following are maps detailing the transportation assets in the region. These assets include railroad service within Pinal County, municipal airports, and highways. The only fixed-route transit within the region is the Central Arizona Regional Transit system, connecting Florence, Coolidge, Casa Grande, and Central Arizona College. Continued investments in transportation infrastructure are important to the region in order to maintain existing road networks, while investing in strategic new roads and highways. With an expanded transportation network, the CAG Region would be poised to capitalize on growth between Phoenix and Tucson, while connecting the region to domestic and international markets.

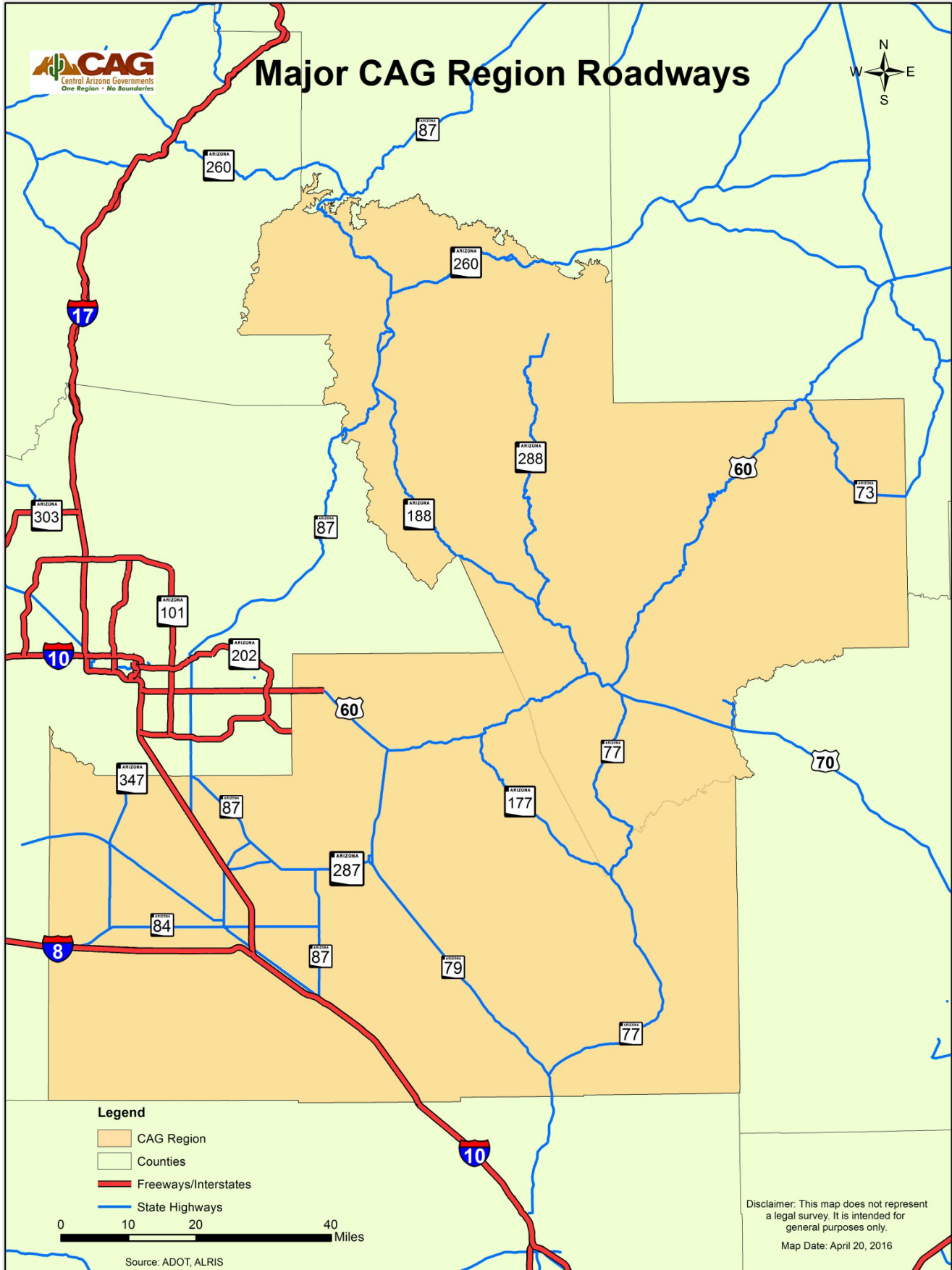
Water, Sewer, Power & Gas

The majority of the region contains inadequate infrastructure, whether due to a lack of service, or through needed repairs and upgrades to local systems. As with many cases within the U.S., rural areas, and even some urban areas within the CAG Region, struggle to maintain their existing systems. It is imperative that these systems are upgraded and expanded to provide for the needs of residents and businesses currently invested in the region. By expansion of these utilities, the CAG Region will be able to attract new businesses with the expanded capacity, and accommodate the overall population growth of the region. Central Arizona is home to the Central Arizona Project, an aqueduct system bringing water from the Colorado River to the central part of the state.

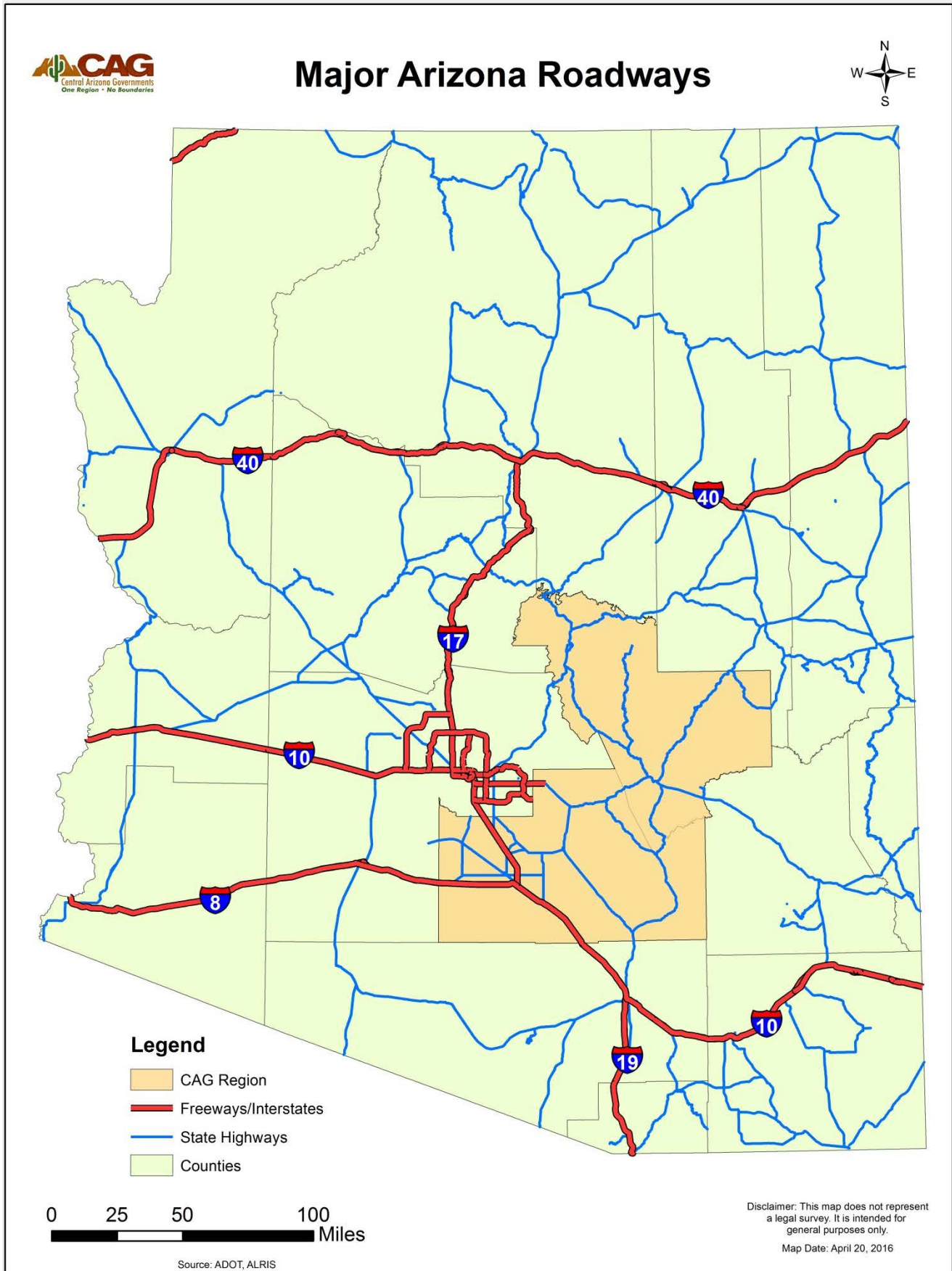
Broadband

Broadband infrastructure, detailed later in this document, is lacking throughout the region. Only 50 percent of households within the region are connected to broadband, compared to the U.S. average of 70 percent. The lack of connections partially has to do with the size of the region. The return on investment for the distance needed to be travelled is not great enough for traditional providers. Another issue with broadband has to do with resiliency of the network. Several CAG Communities have one line coming into the area. If that line is cut, damaged, or otherwise interrupted, service outages occur. This leads to loss of business, issues with healthcare, and other issues. In order for the region to become more competitive, there must be new investment in an expanded broadband network.

Map 9: CAG Major Roadways



Map 10: Major Arizona Roadways



CAG REGION VS. GLOBAL ECONOMY

The Sun Corridor, which is perhaps the best long-term development opportunity for the CAG Region is one of the major mega-regions in the United States. By 2050, the Sun Corridor is anticipated to double in size and contain 85 percent of Arizona's population and jobs.

Western Pinal County, which is geographically situated within the Sun Corridor, is poised to directly benefit from the trade and development of this region and its close proximity to metropolitan Phoenix and Tucson. Eastern Pinal County and Gila County will benefit in that they are the first ring of rural communities that will benefit from the future expansion of the Sun Corridor.

The Sun Corridor is geographically positioned to trade with other regions in the United States, and internationally through:

- Trade with Mexico/Latin America and with the Asia Pacific, and
- Nationally, with the Pacific Coast, the Intermountain West, the Midwest, and the South.

These economic development opportunities will require billions in infrastructure investments to come to fruition. In December 2009, the three Councils of Governments (including CAG) that are the regional planning agencies for the Sun Corridor counties agreed by resolution to form the Joint Planning Advisory Council (JPAC), to more formally cooperate in regional planning at an integrated mega-region scale.

Sun Corridor mega-region planning has focused on transportation improvements that would stimulate and support significant economic development opportunities. These include:

- Three studies on Sun Corridor mega-region opportunities, by Arizona State University, the Brookings Institution, and AECOM.
- Planning for a new Interstate – I-11 – that would connect Mexico to British Columbia, a CANAMEX corridor that passes through the CAG Region. A coalition has been formed to lobby for I-11.
- A freight study to understand whether pass-through trucking and rail movement could generate inland port and other freight-related economic development opportunities for the entire Sun Corridor.

Beyond transportation, it is likely that future JPAC regional planning activities will include mega-region economic development planning.

STATE ECONOMY OF ARIZONA

Arizona's economy was significantly impacted during the recent recession. One of the major issues for Arizona was the decrease in overall housing prices. This cut profits for the construction industry in the building of homes, and led to significant increases in housing foreclosures. Since the recession, Arizona

has recently returned to pre-recession job totals. Following is a summary of Arizona's growing and declining industries, along with Gila and Pinal Counties.

Table 7: Arizona Statewide Growing Industries, Top 10

Rank	NAICS Code	Industry	2011-2015 Job Growth
1	6241	Individual and family services	7,730
2	5614	Business support services	7,560
3	5242	Insurance agencies, brokerages, and related	6,451
4	5415	Computer systems design and related services	5,390
5	5511	Management of companies and enterprises	4,836
6	5182	Data processing and related services	4,564
7	5611	Office administrative services	4,226
8	2381	Building foundation and exterior contractors	4,126
9	4411	Automobile dealers	3,787
10	4541	Electronic shopping and mail-order houses	3,766

Quarterly Census of Employment and Wages (ES-202), 2015

Table 8: Arizona Statewide Declining Industries, Bottom 10

Rank	NAICS Code	Industry	2011-2015 Job Decline
1	4239	Misc. durable goods merchant wholesalers	-3,332
2	9200	Government	-2,848
3	3345	Electronic instrument manufacturing	-2,507
4	3344	Semiconductor and electronic component mfg.	-2,490
5	6111	Elementary and secondary schools	-2,098
6	3364	Aerospace product and parts manufacturing	-1,939
7	2373	Highway, street, and bridge construction	-1,136
8	4251	Electronic markets and agents and brokers	-1,129
9	8134	Civic and social organizations	-1,114
10	4521	Department stores	-1,004

Quarterly Census of Employment and Wages (ES-202), 2015

Table 9: Gila County Growing Industries

Rank	NAICS Code	Industry	2011-2015 Job Growth
1	5311	Lessors of real estate	40
2	6214	Outpatient care centers	16
3	4452	Specialty food stores	13
4	7212	RV parks and recreational camps	13

Quarterly Census of Employment and Wages (ES-202), 2015

Table 10: Gila County Declining Industries

Rank	NAICS Code	Industry	2011-2015 Job Decline
1	4521	Department stores	-222
2	2361	Residential building construction	-59
3	2123	Nonmetallic mineral mining and quarrying	-34
4	8134	Civic and social organizations	-18
5	6244	Child day care services	-16

Quarterly Census of Employment and Wages (ES-202), 2015

Table 11: Pinal County Growing Industries

Rank	NAICS Code	Industry	2011-2015 Job Growth
1	1121	Cattle ranching and farming	263
2	5121	Motion picture and video industries	247
3	1151	Support activities for crop production	213
4	4471	Gasoline stations	184
5	6213	Offices of other health practitioners	135
6	5611	Office administrative services	116
7	5313	Activities related to real estate	69
8	2361	Residential building construction	66
9	4233	Lumber and const. supply merchant wholesalers	60
10	4442	Lawn and garden equipment and supplies stores	58

Quarterly Census of Employment and Wages (ES-202), 2015

Table 12: Pinal County Declining Industries

Rank	NAICS Code	Industry	2011-2015 Job Decline
1	9200	Government	-917
2	5613	Employment services	-895
3	6221	General medical and surgical hospitals	-507
4	7223	Special food services	-225
5	6211	Offices of physicians	-147
6	4244	Grocery and Related Product Wholesalers	-98
7	3212	Plywood and engineered wood product mfg.	-71
8	2373	Highway, street, and bridge construction	-43
9	5111	Newspaper, book, and directory publishers	-41
10	7224	Drinking places, alcoholic beverages	-41

Quarterly Census of Employment and Wages (ES-202), 2015

ECONOMIC PERFORMANCE FACTORS

INNOVATION

According to the Innovation Project from Stats America, much of today’s successful economic growth hinges on attracting or cultivating jobs that characterize the “innovation economy”—firms and occupations relying on talented workers whose skills are based on significant knowledge, insight and creativity. Innovation-based economic growth in rural America, however, has long lagged that in the nation’s metropolitan areas.

To address this gap, the U.S. Economic Development Administration sponsored this project to develop new tools to support strategic economic development planning in rural regions. The goal of this work is to help rural planners assess their region’s comparative strengths and weaknesses with respect to fostering innovation-based growth. The project’s data and tools, however, can be used equally well in any type of region—urban, exurban, metropolitan or custom-based depending upon need and purpose.

The project team has developed three sets of tools for this purpose, tested and refined in collaboration with stakeholders in four rural regions around the nation. The tools, available on this website, include:

- An Innovation Index reflecting a region’s innovation activity and capacity, together with an interactive database containing the index and its component indicators for every county in the nation.
- Data on 15 knowledge-based occupation clusters and 17 industry clusters, also contained in this interactive database.
- Analytical tools to help regional planners evaluate public investment decisions in support of economic growth. (<http://www.statsamerica.org/innovation/about.html>)

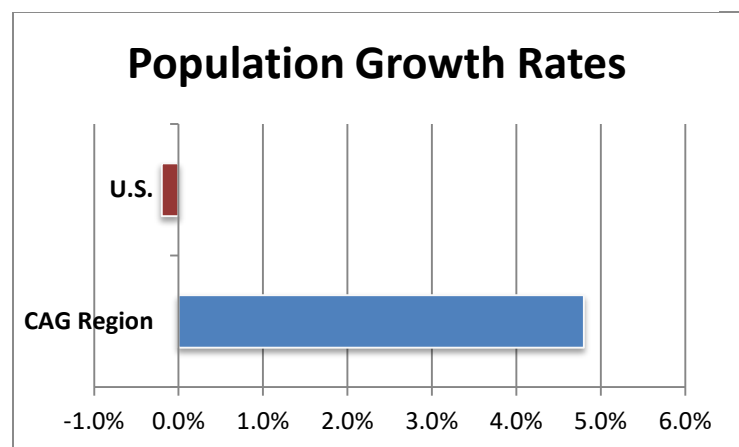
As a region, CAG’s innovation lags behind the U.S. average, scoring 89.8 versus the average, 100, for the nation. The innovation index consists of five components with a weighted average. These components include:

1. Human Capital: 30%
2. Economic Dynamics: 30%
3. Productivity and Employment: 30%
4. Economic Well-Being: 10%
5. State Context (for reference only)

Human Capital

The overall score for human capital was 94.2 compared to the U.S. average of 100. CAG’s population growth rates are significantly better than the U.S. growth rate, and the CAG Region performs well when measuring educational attainment for “some college or associates degree.” Although these components of human capital show promise, the region is markedly lower when comparing against the U.S. in “bachelor’s degree or higher”, and high-tech employment share. Improving these areas would be beneficial, leading to higher wages and greater innovation as the workforce becomes more educated and technologically advanced.

Figure 4: Population Growth Rates

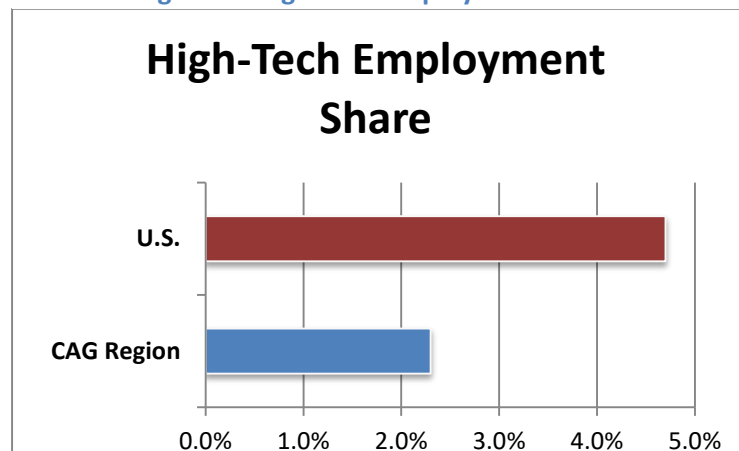


Source: statsamerica.org

Economic Dynamics

The overall score for economic dynamics was 88.8. A major contributor to this lower mark was the lack of venture capital within the region. Venture capital is money invested by a venture capitalist or firm for early stage, high-growth companies, usually in exchange for equity in the business. Currently, the region sees no venture capital as opposed to the U.S. average of nearly \$40 for every \$10,000 in Gross Domestic Product (GDP). Reporting errors may be a

Figure 5: High-Tech Employment Share

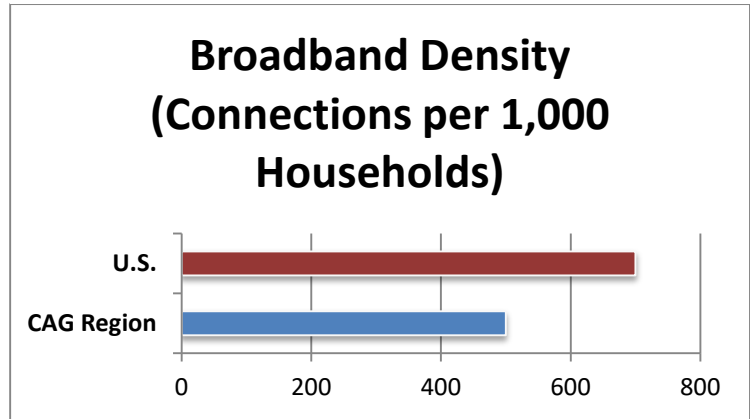


Source: statsamerica.org

contributing factor, but there is a lack of venture capital in the CAG Region. This hampers the capitalization of new ideas, new jobs, and new businesses with growth potential.

Another significant measure is broadband density per 1,000 households. This measures the ability of residents of the region to be connected to broadband, enabling opportunities for telemedicine, e-commerce, and an overall link to information. Broadband is needed in almost all facets of business and is attractive to younger workers. Currently, the CAG region has a household connection rate of 50 percent, compared to the 70 percent average within the U.S. This gap, if left unfilled, will lead to an even greater “digital divide” as areas with broadband access will continue to grow, and areas without sufficient broadband access will fall further behind.

Figure 6: CAG Region Broadband Density



Source: statsamerica.org

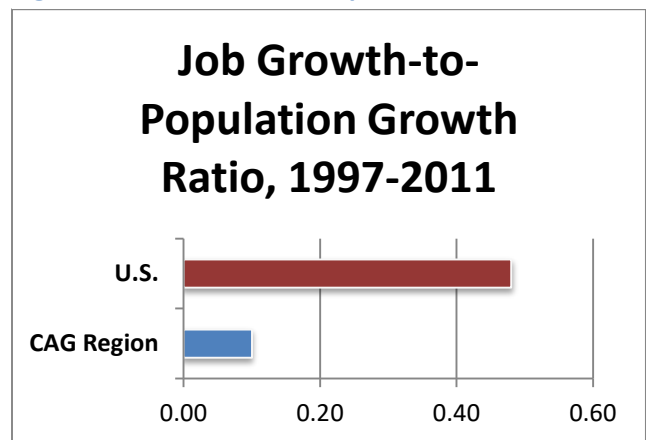
The good news when considering economic dynamics is that the CAG Region has significantly more small establishments per 10,000 workers than the U.S. average. The U.S. average is rated at 371.6, while the CAG Region is at 404.5. This is beneficial as smaller companies are more flexible, able to adapt to new situations and technologies, while avoiding big business bureaucracy. On the other hand, larger companies within the region lag behind the U.S. average. Although small businesses are flexible and adaptable, these larger companies have the resources to fund research and can affect large-scale innovations. A potential strategy exists to continue to grow these small businesses while trying to add a few anchor businesses to support the economy.

Productivity and Employment

The overall score for productivity and employment was 82.6. This is the lowest score for the CAG Region, and reflects the lack of job growth versus regional population growth, meaning there should be significantly more jobs based on the strong growth rate within the region.

As an example, Pinal County had a population of 158,705 in 1997 and grew to 383,690 by 2011. In 1997, Pinal County’s total employment was 53,111. In 2011, that number had increased to 78,619. If Pinal County job growth matched the U.S. ratio of .48, then the 2011 total employment should have increased to 107,992. This means that if Pinal County’s job growth-to-population ratio reflected the U.S. ratio, there would be nearly 30,000 more jobs in Pinal County. The CAG Region is popular with retirees, which may have an effect on this number, but Maricopa County, also popular with retirees, maintains a ratio of 0.45 with a similar median age.

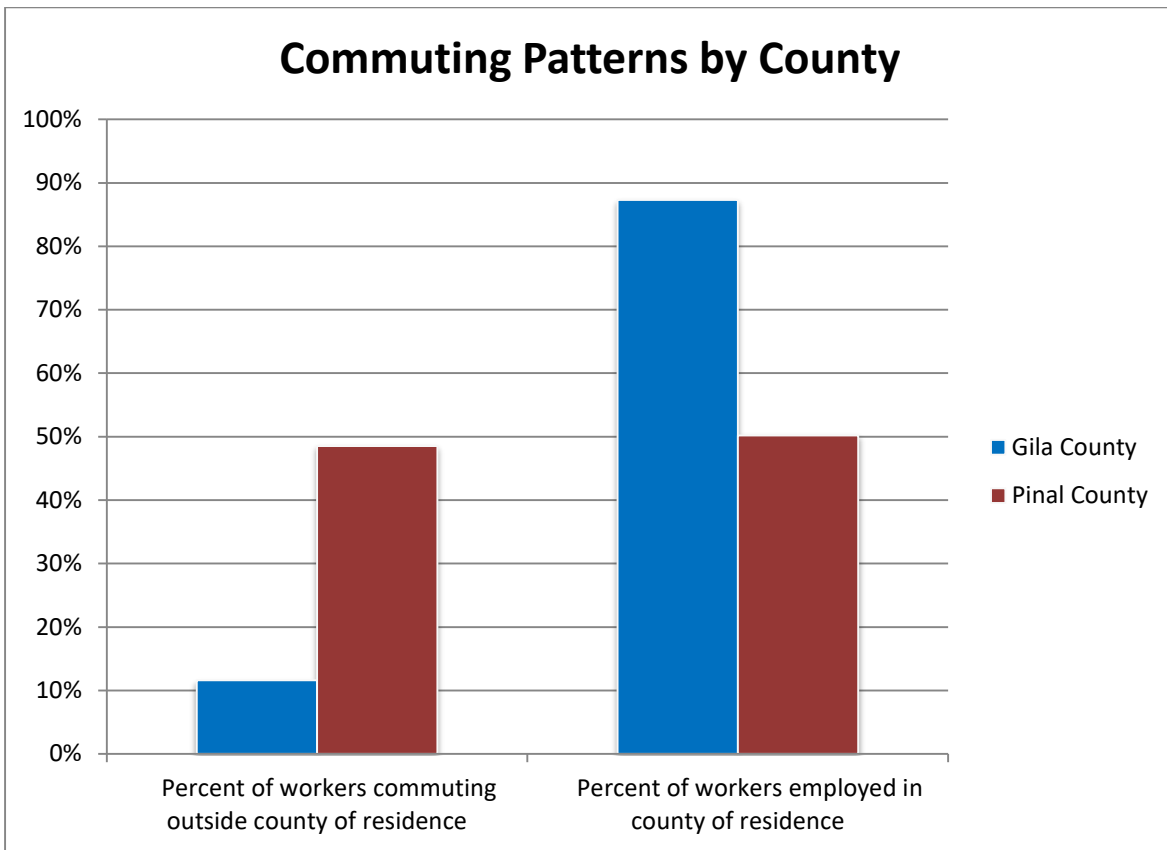
Figure 7: Job Growth vs. Population Growth



Source: statsamerica.org

The most logical cause for this disparity is the population growth on the fringes of the region, then commuting to work.

Figure 8: Commuting Patterns by County



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

Commuting patterns within the CAG Region show that Pinal County loses nearly 50 percent of its workers each day to other counties. The largest communities within the CAG Region are within close proximity to Maricopa County, where there are more than four million residents. This large metro area accounts for a large portion of the jobs within the state, and many workers within the CAG Region commute to Maricopa County. This means that the jobs-to-population ratio may be low because of growth in the region that is located on the fringes of metropolitan Maricopa County. Gila County shows nearly 90 percent retention of its workforce in county.

Other factors in productivity and employment include the following figures, which summarize of some of the region’s struggles in the lack of patents, and percent change in high-tech employment share.

Figure 9: Patents per 1,000 Workers

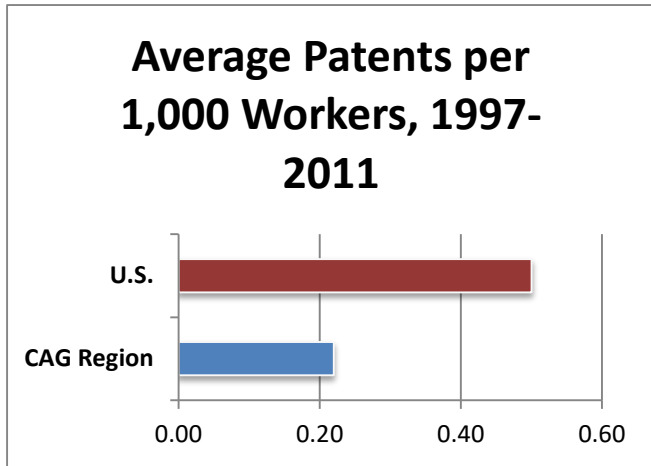
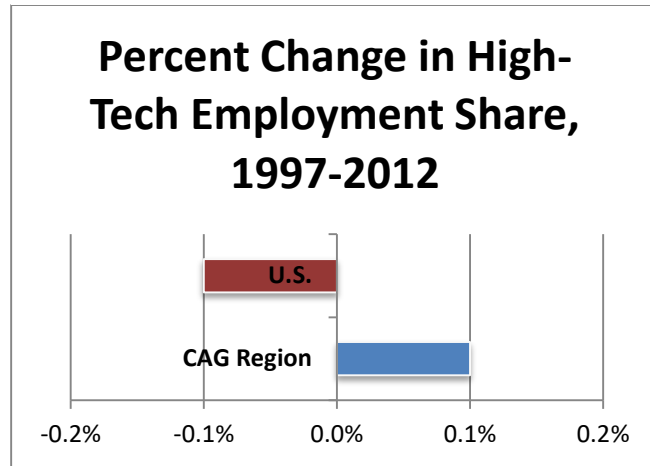


Figure 10: Percent Change in High-Tech Employment



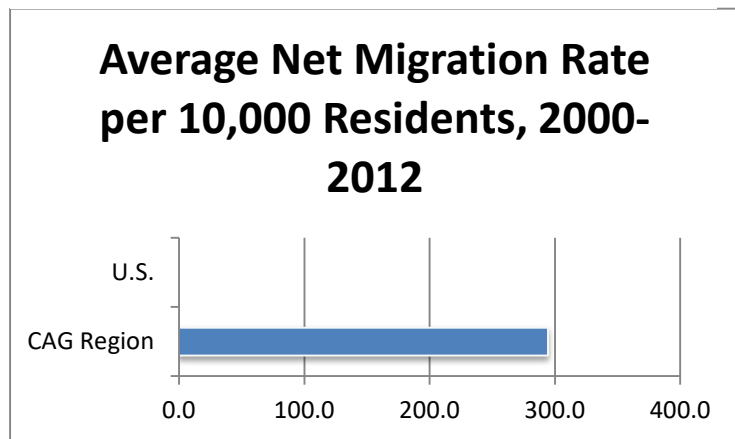
Source: statsamerica.org

The high-tech employment share in the CAG Region is growing slowly, but it is a good indicator that the region is headed in the right direction for high-tech jobs.

Economic Well-Being

The overall score for economic well-being was 101.3, logging the highest score for the region, but this component also carries the least weight. The poverty rates and unemployment rates are lower than the U.S. average. The main factor contributing to the high score in economic well-being is the average net migration per 10,000 residents. The region has shown strong growth through migration, meaning this area is attractive to families as a place to live, and employees as a place to work. This trend should continue into the future as population estimates from the Arizona

Figure 11: Average Net Migration



Source: statsamerica.org

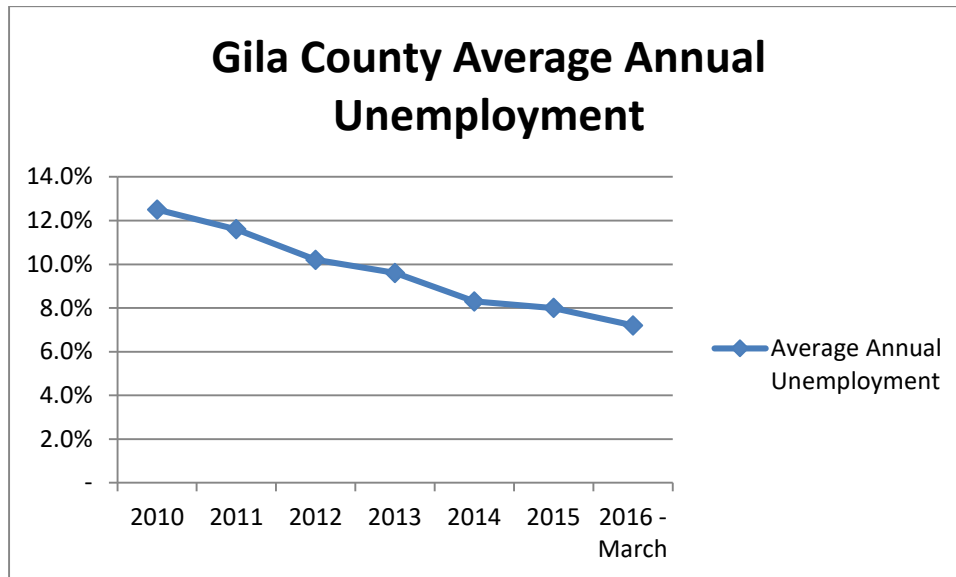
Department of Administration have projected that the CAG Region will increase in population to 1,000,000 people by 2050.

This population growth has not translated into corresponding income growth. In fact, the percent change in per capita income between 1997 and 2012 has indicated a drop of -0.4 percent versus the 1.1 percent growth of the U.S. average. Salaries are growing in the region, just below the U.S. average. However, the salaries of CAG Region workers are being spread out over a larger population, affecting the per capita income number.

UNEMPLOYMENT

At the height of the recession, Gila County's unemployment rate rose to its highest, 14.3 percent, in early 2010. Since that point, the unemployment rate for the county has steadily declined to just above 7.0 percent. This decrease is substantial and shows a positive employment trend for the area, but compared to the 4.2 percent rate in early 2007, there are still significant employment concerns.

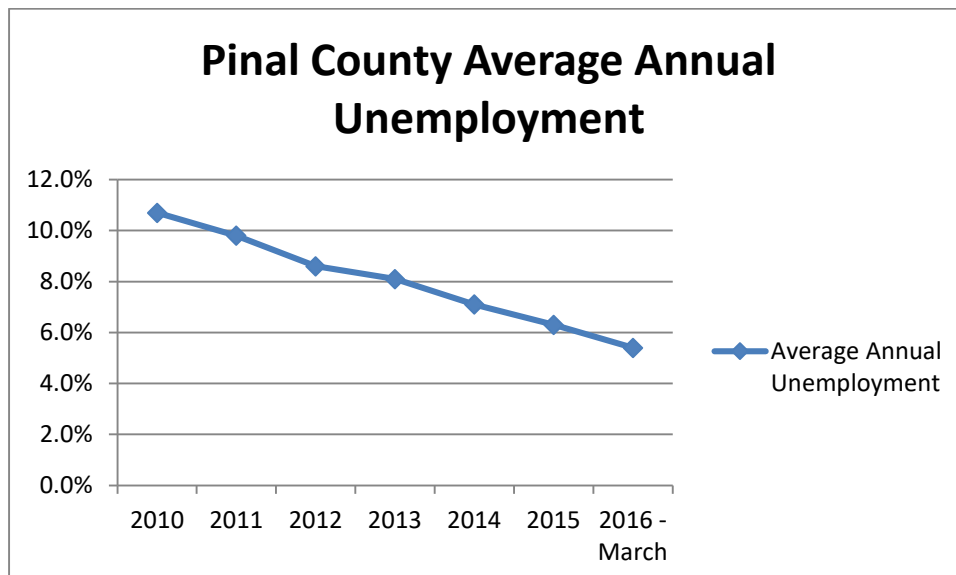
Table 13: Gila County Unemployment



Source: Arizona Department of Administration, Office of Employment and Population Statistics, 2016

At Pinal County's low during the depression, the unemployment rate reached 13.5 percent in mid-2009. Pinal County has also experienced a significant recovery since 2010 and the current employment rate is currently below 6 percent. When comparing the 6.0 percent unemployment rate to the pre-recession rate of 3.8 percent in mid-2007. There is concern by Pinal County to address employment needs of the local population.

Table 14: Pinal County Unemployment



Source: Arizona Department of Administration, Office of Employment and Population Statistics, 2016

SWOT Analysis for the CAG Region

The Economic Development Administration requires the CAG Region to perform a SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis of the regional and local economies. The CAG Region has a variety of economic and demographic profiles, but common themes were identified after considerable discussion by the CEDS Committee. Following is a general summary of regional strengths, weaknesses, opportunities, and threats.

Strengths

- Outdoor recreation
- Land availability and affordability for commercial, industrial, and residential uses
- Interstate 8 and 10 access in western Pinal County
- Historic buildings and downtowns
- Population growth
- Copper industry and mining activities
- Natural resources and beauty
- Arizona Trail
- Copper Corridor Economic Development Coalition
- Tourist destination for nearby Phoenix metro – CAG region serves as gateway and attraction
- Seasonal visitors
- US-60 and Loop 202 access
- Proximity to Phoenix Sky Harbor Airport
- Central Arizona College and associated programs
- Gila Community College
- Eastern Arizona College – Satellite locations
- Arizona Renaissance Festival
- Growing construction market

Weaknesses

- Small business support services
- Sales tax leakage
- Distance to major transportation corridors for rural areas
- Lack of broadband service, especially in rural areas
- “Landlocked” communities surrounded by state lands
- Lack of adequate basic infrastructure to attract industrial development, i.e. water, sewer, adequate roads
- Building supply is not competitive with surrounding areas
- Mines provide little to tax base
- Aging infrastructure
- Fewer job opportunities in smaller communities
- Lack of public transportation

Opportunities

- Outdoor recreation promotion
- Phoenix Mart
- Red Rock Rail
- Healthcare service expansion
- Entrepreneurial Development
- Alternative energy production and employment
- Agritourism/Agritainment growth
- Community partnerships
- Marketing of tourism assets and promoting partnership attractions
- Provision of access to natural features and tourism amenities with the potential for scenic/eco-tourism
- Access to Arizona Trail from Copper Corridor
- At home business growth with broadband expansion
- Combining marketing and branding for the region as a tourist destination
- Develop stronger relationship with Economic Development Organizations throughout the region
- Downtown revitalization
- Development of resorts and leisure businesses
- North/South Corridor – Connection between US-60 and Interstate 10
- Multiuniversity in Payson

Threats

- Recession recovery sluggish in rural areas
- Current workforce skills do not meet needs of technology driven companies
- Image of the State of Arizona
- Focused development in Maricopa and Pima Counties
- Current market is for buildings, not sites
- Lack of demographics to support large-scale retail in some areas
- International market fluctuations with respect to resource extraction
- Lack of cooperation between towns and businesses
- Arizona's tax structure and budget and the effects on small towns and schools
- Availability and access to water
- Small town population loss
- Lack of current and accessible demographic and economic information
- Lack of Education Funding
- School Closures

ACTION PLAN FOR THE CAG REGION

CAG REGIONAL VISION

The vision for the CAG Region is to create a region that is connected to the Arizona, national, and global economy. This will be accomplished by focusing on eight areas within economic development. These focus areas include:

1. Workforce Development
2. Broadband Infrastructure
3. Traditional Infrastructure
4. Economic Diversification
5. Water Conservation/Management
6. Regional Flood Controls
7. Quality of Life and Tourism
8. Regional Transportation Network

Improvement in each of these areas will address many of the challenges of the region while improving incomes, creating jobs, and creating a brighter economic future for the CAG Region.

The following goals and objectives centered on these focus areas will contribute to the economic health and vitality of the region.

Workforce Development

Goal: Promote skills that fulfill gaps in workforce training in Gila and Pinal Counties

Objective: Perform a skills-gap analysis of the region in cooperation with businesses

Objective: Promote programs at community colleges and other workforce training entities that fill existing gaps

Objective: Gather and make available current workforce data

Goal: Attract and promote growth in companies that can utilize existing workforce

Objective: Provide local economic developers with workforce data to use in recruitment

Objective: Coordinate efforts between communities for marketing the region

Goal: Increase GDP per Worker Production

Objective: Investigate factors and opportunities to increase GDP

Objective: Develop talent pipeline within k-12 and through universities

Broadband Infrastructure

Goal: Expand broadband capacity in urban areas while promoting expansion of existing networks into rural communities

Objective: Provide resilient/redundant broadband networks within communities

Objective: Explore variety of broadband distribution methods for last mile connections

Goal: Utilize broadband to promote online entrepreneurship and telecommuting/telework

Objective: Organize workshops to train entrepreneurs about online business

Objective: Develop relationships between businesses and community colleges to stay current on the business of broadband

Goal: Promote telemedicine in the CAG Region

Objective: Promote a healthier population by increasing opportunities to meet with doctors and specialists

Objective: Decrease transportation costs associated with healthcare

Traditional Infrastructure

Goal: Maintain and expand water and sewer networks to meet the needs of businesses and residents

Objective: Evaluate and benchmark current water and sewer networks

Objective: Ensure that costs of service include future replacement and maintenance costs

Objective: Market available supply to outside businesses

Economic Diversification

Goal: Diversify the economy utilizing current strengths to promote business attraction and entrepreneurial startups

Objective: Develop the broadband network and create trainings to promote e-commerce

Objective: Encourage spin-off industries with existing workforce

Objective: Market the region to suppliers and bring them closer to the end user

Objective: Develop sub-regional studies and plans to strengthen specific areas within the region

Water Conservation/Management (Manage existing and develop new resources)

Goal: Assure water supply for CAG communities while seeking out new opportunities

Objective: Ensure new developments meet standards for assured water supply

Objective: Develop new resources to draw water into the region

Regional Flood Control

Goal: Cooperate as a region to decrease the effects of flooding between communities

Objective: Coordinate flood controls within CAG communities and surrounding counties

Objective: Work with FEMA to identify potential projects for flood control and management

Quality of Life

Goal: Maintain existing quality of life and utilize current assets to attract visitors

Objective: Create a coordinated effort to attract visitors to the region

Objective: Preserve character of communities by preserving heritage

Goal: Preserve natural amenities within the CAG Region

Objective: Preserve views and natural landscapes

Objective: Mitigate effects of non-native species to protect existing flora and fauna

Regional Transportation Network

Goal: Expand existing road network to promote flow from population centers to employment centers

Objective: Create opportunities for traffic to travel through the region and create pass through commerce

Objective: Develop new funding streams to fund transportation improvements and new roads

Objective: Coordinate local economic development with transportation improvements

Goal: Maintain current roadways and coordinate with the Arizona Department of Transportation on state highways

Objective: Seek funding streams to improve existing roadways

Objective: Work with existing transportation groups to lobby for transportation projects that will have a strong economic impact

EVALUATION FRAMEWORK AND RESILIENCE

PERFORMANCE MEASURES

Many of the economic performance factors, outlined earlier, are important measures moving forward in the CAG Region. Perhaps of most importance is broadband density. The CAG Region lags behind significantly against the U.S. average. Additional measures of performance include:

- Innovation Index
- Unemployment Rates
- Population to Jobs Ratio
- High-Tech Employment Share
- Tourism Spending
- Educational Attainment
- Patents
- Workforce Statistics
- Degrees/Certificates Earned
- Tourism Visitor Counts
- Start-Up Businesses
- GDP per Worker
- Arizona Progress Meters

The CAG Region will work toward improving these measures by utilizing the strategies outlined in the CEDS, and initiating projects as defined by the communities. Regional cooperation and partnerships will become more important to the improvement of these measures.

ECONOMIC RESILIENCE

The CAG Region is a resilient one, having weathered the recent recession, and surviving global market ups and downs in key industries. There are opportunities for improvement with three key factors that would have long lasting effects on the resilience of the region. These factors are economic diversification, exports, and education. The CAG Region relies heavily on a few industries. Diversifying the economy, while maintaining the current industries, is of great importance. Diversification allows for recovery in other industries if one or two industries experience a downturn. This can be accomplished through new business creation, targeting new industries that have linkages to current regional industries, and building a workforce to meet the needs of current and future employers.

Exports play an integral role in the resilience of any economy, and will be important in the future. As the CAG Region continues to grow in between the large metropolitan areas of Phoenix and Tucson, so too will its influence on the state, national, and global economy. Businesses need to focus on increasing international trade so when national markets experience lags or downturns, international markets can support regional industries. According to a study by the University of California, Berkeley, regions that have many export industries are more resilient to employment downturns. Focusing on growing industries with export potential will also bolster the resilience of the CAG Region.

Finally, educational attainment will be a key to the future economic success of the region. The CAG Region would benefit from increasing the number of graduates with bachelor's degrees and higher degrees. The region significantly drops below the U.S. average in the number of graduates. Education leads to greater incomes and opportunities for residents. This can come in either attracting graduates to the region, or keeping graduates in the region.

Appendixz

CAG Region Project Listing

Agency	Project Description	Priority	Cost
Ak-Chin Indian Community	Broadband Internet @ Commerce Center	High	\$415,000
Ak-Chin Indian Community	Extension of Lopez Ave. to Miguel St.	Medium	\$550,000
Apache Junction	Updated Traffic Circulation Plan	High	\$100,000
Apache Junction	Active Transportation Plan	High	\$200,000
Apache Junction	Citywide Storm Water Improvement Master Plan	High	\$200,000
Apache Junction	General Plan Update	Med	\$200,000
Apache Junction	Design of Downtown off leash dog park	Med	\$50,000
Apache Junction	Construction of Downtown off leash dog park	Med	\$650,000
Apache Junction	Water Infrastructure Upgrade - WTP Improvements	Med	\$1,150,000
Apache Junction	Downtown Wayfinding Study	Med	\$150,000
Apache Junction	Silly Mountain improvements (road, signage, etc)	Low	\$2,600,000
Apache Junction	Baseline Ave improvements - Meridian to Ironwood	Low	\$6,050,000
Apache Junction	Business Park study	High	\$165,000
Apache Junction	US60 Corridor - Strategic Development Plan -NEW FY17	High	\$200,000
Apache Junction	Utility Master Plan Study	Medium	\$100,000
Apache Junction	Apache Trail Corridor Study	Low	\$300,000
Apache Junction	Meridian Corridor (US60 south to Elliot) Study	Low	\$300,000
Apache Junction	Old West Highway Beautification	Low	\$100,000
Apache Junction	Waterline extension on Cortez (OWH to Shouthern)	Medium	
Apache Junction	Winchester (16th to Southern) - widen, C&G, Sidewalk, Storm	High	\$1,800,000
Apache Junction	Winchester (Southern to 29th) - drainage	High	\$800,000
Apache Junction	Southern (Delaware to Ironwood) - widen, C&G, Sidewalk, Storm	High	\$1,980,000
Apache Junction	Old West Highway (Idaho to Goldfield) C&G, Sidewalk	High	\$1,550,000
Apache Junction	Grand View Neighborhood - C&G, sidewalk, storm	High	\$2,700,000
Apache Junction	Idaho (Superstition to McKellips) Bike lanes, C&G, Sidewalks	High	\$1,500,000
Apache Junction	Regional Ground Water Recharge	Med	\$350,000
Apache Junction	SRP-CAP Interconnect	Low	\$500,000
Apache Junction	Downtown Master Plan Update	High	\$100,000
Apache Junction	BID District Feasibility Study	Med	\$25,000
Apache Junction	Flatiron Park Phase - Ramada, concrete, etc	High	\$150,000
Apache Junction	BLM - Acquisition	Med	\$400,000
Apache Junction	Multifamily and Mixed Use Market Feasibility Study	High	\$50,000

CAG Region	Tourism Branding and Marketing Strategies	Medium	\$30,000
CAG Region	Apache Trail Tourism Promotion	Medium	\$50,000
Casa Grande	Kortsen I-10 interchange	High	\$30,500,000
Casa Grande	Construction of community recreation center	High	\$16,000,000
Casa Grande	Runway expansion project	High	\$5,000,000
Casa Grande	Development of linear park with amenities including walking trails	High	\$3,000,000
Casa Grande	Wastewater effluent recharge project phase I	High	\$2,500,000
Casa Grande	Develop a 5-year economic development strategic plan	High	\$50,000
Casa Grande	Thornton Rd. & Peters Rd. traffic signal	High	\$400,000
Casa Grande	Thornton Rd. & Selma Rd. traffic signal	High	\$400,000
Casa Grande	Widening of Peters Rd. from (Commerce Dr. to Thornton Rd.)	High	\$2,000,000
Casa Grande	Widening of Thornton Rd. (Maricopa-Casa Grande Hwy to Interstate 8)	High	\$11,000,000
Casa Grande	Regional Technology/Training Center	High	\$15,000,000
Casa Grande	Extension of Peters Rd. sewer line (Commerce Dr. to Thornton Rd.)	High	\$2,000,000
Casa Grande	Construction of Burriss Rd. Effluent line	Medium	\$5,000,000
Casa Grande	Hennes I-8 interchange	High	\$30,500,000
Casa Grande	Val Vista I-10 interchange	Medium	\$30,500,000
Casa Grande	Construction of a major community park including multiple amenities	Medium	\$5,000,000
Casa Grande	Improved road access to the city's airport industrial park.	Medium	\$600,000
Casa Grande	East Side Sewer Line Extension	High	\$10,000,000
Casa Grande	Small Business Incubator development	Medium	\$1,500,000
Casa Grande	Selma Rd. improvements (Burriss Rd. - Thornton Rd.)	High	\$1,000,000
Casa Grande	Burriss Rd. improvements (Hwy 85 - Selma Rd.)	High	\$6,000,000
Casa Grande	Florence Blvd. improvements - I-10 to N. Camino Mercado	High	\$1,000,000
Coolidge	County (ADRP) Dirt Rd. Program	Medium	\$560,000
Coolidge	Landfill Closure	Medium	\$550,000
Coolidge	Coolidge Airport Improvements (New Hangers, Restrooms, Pilots Lounge, Parking Areas)	High	\$2,500,000
Coolidge	Rail Siding and Spur construction	High	\$4,000,000
Coolidge	Bartlett Effluent Line	Medium	\$560,000
Coolidge	Farm Well Improvements	Medium	\$115,000
Coolidge	Wastewater Treatment Plant Conversion	High	\$35,000,000
Coolidge	Traffic Signal - Arizona Blvd. at Safeway Center	High	\$350,000
Coolidge	Vah Ki Inn Railroad X-ing Improvements	Medium	\$500,000
Coolidge	Citywide Roadway Improvements	High	\$30,000,000
Coolidge	Sewer Master Plan	High	\$80,000
Coolidge	Wastewater Treatment Plant Improvements	High	\$169,900

Coolidge	Downtown Beautification	High	\$500,000
Coolidge	Airport Wastewater Treatment Plant	High	\$1,500,000
Coolidge	Central Avenue Railroad X-ing Improvement	Medium	\$500,000
Coolidge	Houser Road / Hwy 87 RR X-ing and Intersection Improvements	High	\$1,000,000
Coolidge	Airport Industrial Park	Medium	\$5,000,000
Coolidge	Increase Electrical Capacity to the Airport	High	\$1,500,000
Coolidge	Water Park (Splashpad)	High	\$1,000,000
Coolidge	Business Success Center	High	\$20,000
Coolidge	Installation of Solar Generation facility	Medium	\$4,000,000
Coolidge	Water/Waste Water treatment plant Southern portion of City	High	\$45,000,000
Coolidge	Traffic Signal - Skousen Rd. and HWY 87	High	\$600,000
Coolidge	Energy Project: Replace Streetlights with SMART - LED (security cameras), efficient motors	High	\$1,800,000
Copper Corridor EDC	Business Success Center	High	\$20,000
Copper Corridor EDC	Preserve history and characteristics of the region	High	\$18,000
Copper Corridor EDC	Celebrate natural and cultural history	High	\$10,000
Copper Corridor EDC	Broadband expansion to un/underserved areas	High	\$10,000,000
Copper Corridor EDC	Knowledge base of business data	High	\$10,000
Copper Corridor EDC	Train small businesses in Copper Corridor on becoming licensed, bonded and how to qualify for procurement through local companies	High	\$150,000
Copper Corridor EDC	Develop youth component to local tourism. Create community kitchens within Copper Corridor	High	\$150,000
Copper Corridor EDC	Create relationships to support agriculture, health care and tourism within Copper Corridor (mobile slaughter houses, mobile visitor center, community gardens)	Medium	\$200,000
Copper Corridor EDC/Pinal County	Expansion of broadband infrastructure and services within Pinal County	High	\$25,000,000
Eloy	Water system improvements	High	\$6,451,250
Eloy	Water System Improvements – Sunland Gin & I-10	High	\$5,000,000
Eloy	Water System Improvements – Toltec Road & I-10	High	\$5,000,000
Eloy	Pavement of Rural Roads – PM10 compliance	High	\$5,000,000
Eloy	Increase waste water treatment plant capacity to 4MGD	High	\$3,500,000
Eloy	Battaglia Road Improvements/Sunshine Blvd. to SR 87	High	\$3,500,000
Eloy	Sunshine Blvd Reconstruction – Frontier to Battaglia	High	\$1,400,000
Eloy	Frontier Street Resurfacing	High	\$1,240,000
Eloy	Toltec Subdivision Sewer Construction	High	\$850,000
Eloy	Regional Drainage Study	High	\$300,000

Eloy	Main Street Eloy Beautification Project	High	\$300,000
Eloy	Frontier Street Beautification	High	\$250,000
Eloy	Downtown Theater Stabilization and Renovation Project	High	\$200,000
Eloy	Downtown Façade Improvements	High	\$125,000
Eloy	Citywide Removal of Dilapidated Structures	High	\$100,000
Eloy	Eloy Water Tower Public Arts Project	High	\$30,000
Eloy	Police Department Renovation/Reconstruction	Medium	\$10,000,000
Eloy	New Community Park	Medium	\$8,800,000
Eloy	Development of Old Toltec School as Chamber of Commerce/Community Museum/Visitor Center	Medium	\$300,000
Eloy	Airport Industrial Park Master Plan	Low	\$125,000
Eloy	Construction of Miscellaneous Airport Improvements	High	\$2,500,000
Eloy	Runway Extension-Southwest	High	\$1,800,000
Eloy	Design and Construction of New Sewer Lines	High	\$2,000,000
Eloy	Toltec Road Chip Seal	High	\$750,000
Eloy	Phillips Road Reconstruction and Chip Seal	High	\$800,000
Eloy	Phoenix Avenue Resurfacing/Curiel to B Street	High	\$750,000
Eloy	Waterline Replacements Throughout the City	High	\$1,250,000
Eloy	Eloy Proper-Slurry Seal for Streets	High	\$1,000,000
Eloy	Shedd Road Landscape Design and Construction	High	\$200,000
Eloy	New Public Safety Complex	High	\$1,250,000
Eloy	Open Space, Trails and Parks Master Plan	High	\$100,000
Eloy	Downtown Master Plan	High	\$100,000
Eloy	New Well at Municipal Airport	High	\$1,000,000
Eloy	Fire Hydrant Replacement	High	\$600,000
Eloy	Reconstruction of Water Pump at Airport	High	\$2,250,000
Florence	Road and intersection improvements	High	\$15,184,000
Florence	Recharge Injection Wells/Polishing Lagoons	High	\$500,000
Florence	Sewer Main Extensions & Replacements	High	\$450,000
Florence	WWTP Expansion	High	\$1,135,000
Florence	Recharge Facility Expansion	High	\$500,000
Florence	SCADA Tie-in/Sewer Controls	High	\$75,000
Florence	Water Well Chlorine Building	High	\$1,000,000
Florence	Water Line Replacements	High	\$1,180,000
Florence	SCADA Tie-in (water)	High	\$25,000
Florence	Well Booster Pumps	High	\$650,000
Florence	Well Chlorination	High	\$50,000
Florence	Silver King Marketplace Repairs	High	\$40,000
Florence	Signal Light @ SR 79 & Hunt Highway	High	\$1,100,000
Florence	2020 General Plan (RTP & PTOSMP)	High	\$650,000

Florence	Network Server Infrastructure	High	\$72,000
Florence	Enterprise Data Storage Infrastructure	High	\$27,250
Florence	GIS Server	High	\$25,000
Florence	Heritage Park Improvements	High	\$266,000
Florence	Dog Park Improvements	High	\$13,313
Florence	Main Street Park Improvements	High	\$22,238
Florence	Poston Butte Open Space and Trails Development	High	\$1,259,000
Florence	Storm Water Master Plan	High	\$300,000
Florence	Pavement Preservation	High	\$1,600,000
Florence	Project Centennial	High	\$2,000,000
Florence	Water Storage Tank N. Florence	High	\$20,000
Florence	Recharge Facility Expansion	High	\$40,000
Florence	Miscellaneous (Sewer Projects)	High	\$300,000
Florence	Recharge Permitting & Design	High	\$50,000
Florence	WWTP Compliance/Permitting Equipment	High	\$38,500
Florence	South WWTP Improvement Modifications	High	\$500,000
Florence	South WWTP Expansion Headworks	High	\$2,150,000
Florence	System Wide Capacity/Condition Analysis	High	\$150,000
Florence	Main Street Sewer Main Replacement	High	\$1,000,000
Florence	Merrill Ranch Waste Water Treatment Plant location, design, and construction	High	\$75,000
Gila County	Abandon housing demolition	Medium	\$500,000
Gila County	Housing Rehabilitation	High	\$1,000,000
Gila County	Affordable Housing Master Plan	High	\$60,000
Gila County	New Signal Peak Communications Tower	High	\$2,500,000
Gila County	County Fairgrounds Improvements (Race Track)	High	\$5,000,000
Gila County	Landfill Expansion Purchase (Townsite Act)	High	\$4,000,000
Globe	Waterline replacement and fireline installation	High	\$2,600,000
Globe	Wastewater Treatment Plant Improvements	High	\$18,300,000
Globe	Public Safety Facility	High	\$5,000,000
Globe	Regional Aquatic Center	Medium	\$10,000,000
Globe	Broadband Internet	High	\$1,000,000
Globe	Pinal Creek Trail	Medium	\$3,000,000
Hayden	Upgrade to lift/primary pump stations	High	\$350,000
Hayden	New Mountain View Street improvements	High	\$160,000
Hayden	Engineering for wastewater project/ADA doors	High	\$137,000
Hayden	San Pedro Ave sidewalk construction/renovation	Medium	\$375,000
Hayden	Home & business demolition	Medium	\$300,000
Hayden	Cemetery upgrade and land purchase	Medium	\$200,000
Hayden	Develop Hayden Master Plan	Medium	\$75,000
Kearny	Roadway Improvements	Medium	\$1,000,000

Kearny	Construction of new fire station	Medium	\$1,000,000
Kearny	Construction of Multi-use facility	Medium	\$1,000,000
Kearny	Construction of 24 hour urgent care facility	Medium	\$1,000,000
Kearny	Local Street Paving	Medium	\$950,000
Kearny	Street lighting - Public safety and meet Dark Sky standards	Medium	\$200,000
Kearny	Fire hydrant replacement	Medium	\$75,000
Kearny	Public swimming pool renovations	High	\$2,000,000
Kearny	Kearny Lake and water quality improvements	High	\$1,000,000
Kearny	Repair and upgrade of water wells	High	\$1,000,000
Kearny	Wastewater Treatment Facility Improvements	High	\$500,000
Kearny	Lake park facilities construction	High	\$250,000
Kearny	Housing rehabilitation	High	\$250,000
Kearny	Airport improvements	Medium	\$1,335,000
Kearny	Gila River Park	Medium	\$500,000
Kearny	Fire truck(s)	High	\$350,000
Kearny	Offroad Vehicle Park	High	\$150,000
Kearny	Rail and Copper Park improvements	Medium	\$185,000
Mammoth	Update well pumps and sewer infrastructure	High	TBD
Mammoth	Water main line replacements	High	TBD
Maricopa	Remove land from floodplain	High	\$25,000,000
Maricopa	Land, design and construction of City Complex.	High	\$15,000,000
Maricopa	Relocation of Amtrak Station	High	\$2,000,000
Maricopa	Guidelines for revitalization area	High	\$100,000
Maricopa	Maricopa Industrial Park	High	\$50,000
Miami	Capacity and efficiency sewer improvements	High	\$3,000,000
Miami	Town pool facilities renovation	High	\$1,000,000
Miami	Bridge/Park rehabilitation and renovation	High	\$500,000
Miami	Sewer system improvement	High	\$475,000
Miami	Sullivan Street and connector streets improvements	High	\$400,000
Miami	Modification of sidewalks for ADA compliance	High	\$250,000
Miami	Rose Road improvements	High	\$200,000
Miami	Demolition/renovation of vacated properties	Medium	\$5,000,000
Payson	Broadband Point of Presence Fiber from Payson to Forest Lake	High	\$3,000,000
Payson	Multi-Generational Center/training/ice hockey arenas Rumsey Park Project	High	\$8,000,000
Payson	American Gulch Improvements	High	\$10,000,000
Payson	Event Center Master Plan and Improvements	Medium	\$4,200,000
Payson	PATS Continuation	High	\$1,275,000
Payson	Rumsey Park Pedestrian Circulation and lighting plan	High	\$50,000
Payson	Highway Landscape Beautification	Medium	\$150,000

Payson	New road construction in the Rumsey Drive alignment.	High	\$2,100,000
Payson	Master plan for park system	High	\$130,000
Payson	Construction of new roadway	Medium	\$980,000
Payson	Validation of Payson Facility Study	High	\$500,000
Payson	Addition of 16 miles of pipeline and a water treatment plant	High	\$24,000,000
Payson	Roadway Improvements	High	\$600,000
Pinal County	Hunt Highway improvements	High	\$20,500,000
Pinal County	San Tan Valley Roadway Improvements	High	\$6,520,140
Pinal County	County Court-house expansion	N/A	\$15,000,000
Pinal County	P25 Radio upgrades	High	\$20,000,000
Pinal County	County Courthouse Expansion	N/A	\$15,000,000
Pinal County	Public Health Clinic - Casa Grande	N/A	\$800,000
Pinal County	Pinal County Sheriff Sub-station (San Tan Valley)	Medium	\$8,000,000
Pinal County	Pinal County Administration / Services Building - City of Maricopa	High	\$8,788,000
Pinal County	Justice of the Peace Building - Hunt Hwy., Queen Creek	High	\$2,400,000
Pinal County	Pinal County Attorneys Office Administration Building - Florence	Medium	\$18,000,000
Pinal County	New Development Services Building - Florence	High	\$14,960,000
Queen Creek	Ellsworth and Queen Creek Road Intersection	N/A	\$3,400,000
Queen Creek	Queen Creek Corporation Yard- Design and Phase 1	N/A	\$1,800,000
Queen Creek	Riggs Road- Ellsworth to Meridian Roads	N/A	\$14,500,000
Queen Creek	West Park	High	\$20,000,000
Queen Creek	Update of Phoenix/Mesa/Gateway zoning overlay districts	High	\$9,000
Queen Creek	Update Development Services' fees	High	\$9,000
Queen Creek	Transit Study for future commuter rail service	Medium	\$50,000
Queen Creek	Initiate Study of Potential Public Art Ordinance/Program	Medium	\$9,000
Queen Creek	QC Sports Complex (East Park)	High	\$43,000,000
Queen Creek	Trail system project- Sonoqui Wash Trail, Riggs Road channel from Hawes to Ellsworth Road	Medium	\$1,300,000
Queen Creek	Trail system project- Sonoqui Wash Trail, Riggs Road channel from Ellsworth Road to Crismon Road	Medium	\$1,300,000
Queen Creek	Trail system project- Queen Creek Wash Trail, Crismon alignment to the railroad tracks	Medium	\$1,900,000
Queen Creek	Trail system project- Ryan Road/SRP utility easement trail, Ellsworth Road to Signal Butte Road	Medium	\$3,600,000
Queen Creek	Crismon Road- Queen Creek to Germann Roads	High	\$2,000,000

Queen Creek	Power Road- Brooks Farm to Ocotillo Road	High	\$5,500,000
Queen Creek	Power Road- Brooks Farm to Chandler Heights Road	High	\$4,200,000
Queen Creek	Meridian Road- Combs to Queen Creek Wash	High	\$7,600,000
Queen Creek	Ocotillo Road- Sossaman to Hawes Roads	High	\$7,200,000
Queen Creek	Rittenhouse Road- Village Loop North to Riggs Road	High	\$6,900,000
Queen Creek	Town Center- Zoning District Overlay and Drainage Analysis	High	\$129,000
Queen Creek	Town Center- Traffic and Parking Study	Low	\$50,000
Queen Creek	Town Center- Branding Strategy	Low	\$50,000
Queen Creek	Update to the Economic Development Strategic Plan	Medium	\$50,000
Queen Creek	General Plan 2018 Update	High	\$250,000
Queen Creek	Drainage mapping plan to mitigate flood concerns	Medium	\$20,000
San Carlos Apache Tribe	Second Casino Site Apache Sky	High	\$38,000,000
San Carlos Apache Tribe	Apache College	High	\$5,000,000
San Carlos Apache Tribe	Cutter Airport Hanger/Lobby	Medium	TBD
San Carlos Apache Tribe	Ground Water Lease	High	TBD
San Carlos Apache Tribe	Spring Water Sales	Medium	TBD
San Carlos Apache Tribe	Economic Holding Corporation	Medium	TBD
San Carlos Apache Tribe	IRR Route #6 Road Repair	High	\$6,000,000
San Carlos Apache Tribe	Seneca Lake Recreation	Medium	TBD
Superior	Legends of Superior Trail - Reroute of western segment due to ADOT construction	High	\$500,000
Superior	Designation of Recreational User Trails - Superior Conceptual Trails Plan (Mountain Climbing, Hiking, Bicycle, Equestrian)	Medium	\$2,000,000 +
Superior	Upgrade of a major community parks including multiple amenities	Medium	\$100,000
Superior	Paving of town streets	High	\$6,000,000
Superior	Renovation of Town Owned Buildings for Commercial use	Medium	\$250,000
Superior	Airport Infrastructure	Low	\$500,000
Superior	Development of Green Belt	Low	TBD
Superior	Blight Mitigation	High	\$250,000
Superior	Construction of Multi-Generational Center and Library	High	\$2,000,000
Superior	Marco Rail line infrastructure	Medium	\$15,000,000
Superior	Historical and Cultural Development center	Low	TBD
Superior	Waste Water Treatment Plant	High	\$1,400,000
Winkelman	Hwy 77 beautification and ADOT drainage	High	\$50,000
Winkelman	Construction of Community/Youth Center	Medium	\$500,000
Winkelman	Paving of town streets	Medium	\$500,000
Winkelman	Renovation of buildings for commercial use	Medium	\$500,000
Winkelman	Housing rehabilitation	Medium	\$300,000
Winkelman	Cobo Lane beautification and park entrance design	Medium	\$150,000

Winkelman	New garbage truck and packer	Medium	\$150,000
Winkelman	Extending Town Hall to add magistrate court	Medium	\$100,000
Winkelman	Job Training Center	Low	TBD
Winkelman	Develop town Police Department	Low	\$500,000
Winkelman	Museum	Low	\$200,000
Winkelman	Fire Station Renovation	Low	\$100,000