



Economic Development Strategic Plan

Prepared for Christian County, Missouri

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EXECUTIVE COMMITTEE:

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Keith Rollings
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Ozark Chamber Exec Director

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Mark Alexander
Director Cox Pre-hospital Services

Matt Wehner
Co-owner Cabinet Concepts by Design

Gloria Roling
CEO, Greater Springfield Home Builders Association

Mike Fusek
Senior Advisor, Sperry Van Ness, Rankin Company, LLC

Scott McDonald
President Nixa Area Empire Bank

ABOUT US



TIP STRATEGIES, INC. is a privately held Austin-based economic development consulting firm committed to providing quality solutions for public and private-sector clients. Established in 1995, the firm's primary focus is economic development strategic planning.

Tom Stellan
President & CEO
tom@tipstrategies.com

Caroline Alexander
Project Manager
caroline@tipstrategies.com

TIP Strategies
106 East 6th Street, Suite 550
Austin, Texas 78701
PH: 512.343.9113
FX: 512.343.9190
www.tipstrategies.com

INTRODUCTION

Christian County is the fastest growing county in the Springfield metropolitan area. Between 2000 and 2010, Christian County grew almost 43% while the metropolitan area as a whole grew only 18%. The cities of Nixa and Ozark led the growth in Christian County, with Nixa growing almost 57% and Ozark growing almost 85%.

Excellent education opportunities, good value housing, and high quality of life have made North Christian County a destination for young families in the Springfield region. According to a citizen survey conducted as part of this planning process, the high quality schools were most often cited as the region’s greatest economic development asset.

However, the rapid population growth has not been counter-balanced with commercial growth. This imbalance poses challenges for the region’s public entities that must provide services to these residents. As residential permits dropped from a peak of over 1,700 in 2005 to just under 300 in 2011, the municipalities of the region found themselves struggling to find more sustainable engines of growth.

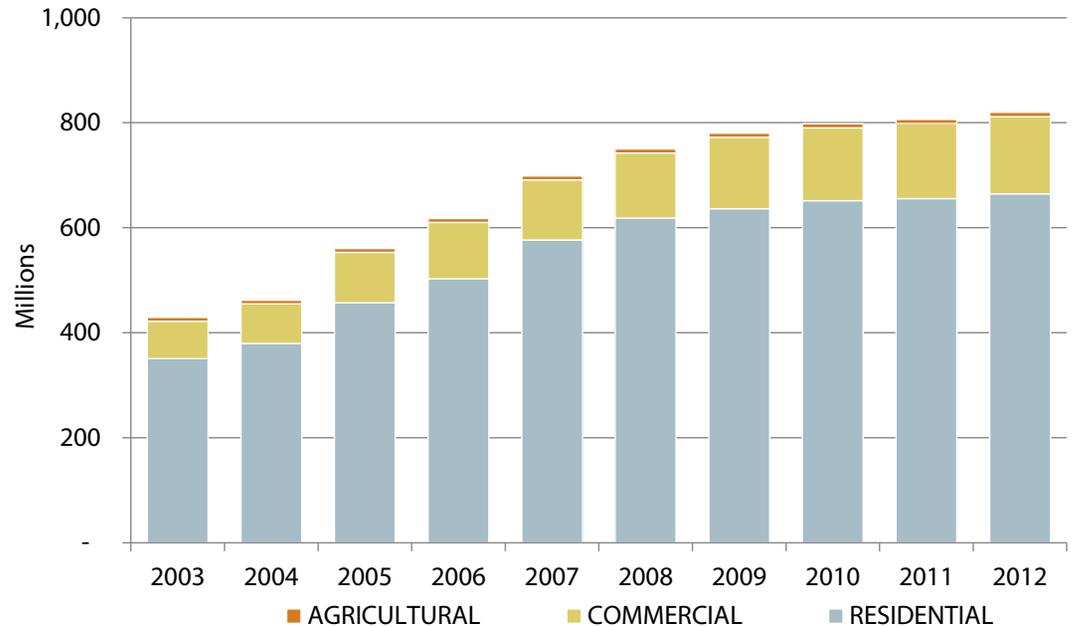
Between 2003 and 2012, Christian County’s tax base grew by 91%. The residential base grew by 90% while the commercial base grew by 107%. The value of agricultural land grew by only 9%. Because the commercial base grew more quickly, it gained share of the total valuation. The commercial tax base grew from 17% in 2003 to 18% in 2012 while the residential

COMPARATIVE POPULATION CHANGE

	City of Nixa	City of Ozark	Christian County	Springfield MSA
2000	12,124	9,665	54,285	369,920
2010	19,022	17,820	77,422	437,436
Net change	+6,898	+8,155	+23,137	+67,516
% change	56.9%	84.4%	42.6%	18.3%

Sources: U.S. Census Bureau, Missouri State Data Center.

ASSESSED VALUE BY TYPE



Sources: Christian County Tax Assessor, 2003 – 2012.

tax base fell from 82% to 81% and agricultural grew from 2% to 1%. While this growth is trending in the right direction, the county's tax base remains overwhelmingly residential. By comparison, Greene County's residential tax base represented 65% of its total assessed valuation in 2012.

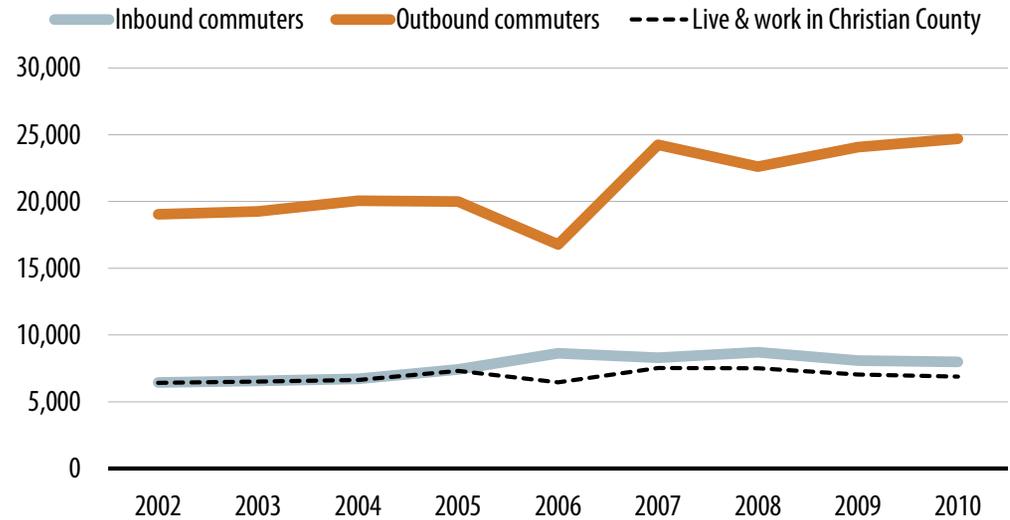
In addition, about 80% of the workforce commutes out of the county each day. This commuting pattern not only poses challenges for the area's transportation networks, it also poses challenges for local retailers and establishments that depend on the area's daytime population.

This challenge for area retailers is a significant threat to the fiscal sustainability of Christian County communities, which depend on sales tax receipts as a primary source of revenue. For the Cities of Nixa and Ozark, sales tax receipts are the single largest revenue source. In 2012, sales taxes accounted for 32% of Nixa's total revenues and 26% of Ozark's total revenues. This dependency on sales tax revenues leaves the communities particularly vulnerable to business cycles.

In the face of these challenging times, the Cities of Nixa and Ozark, their chambers of commerce, and Christian County came together to search for a solution. In August 2012, the group hired TIP Strategies to assist in the preparation of an economic development strategic plan.

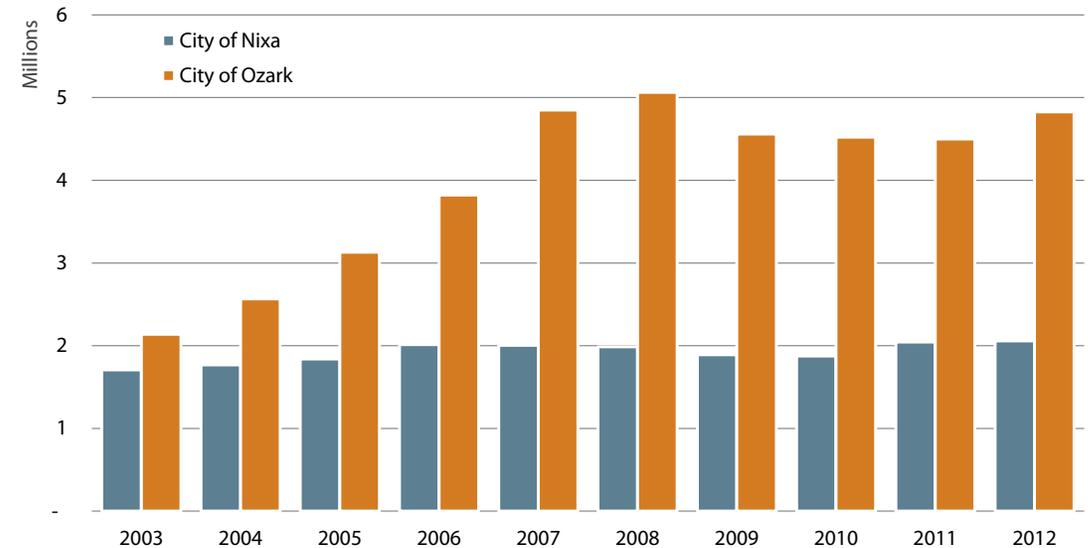
The objective of the strategic planning initiative is to provide a blueprint for more balanced growth and increase the self-sufficiency of the region. With an on-going, concerted, and collaborative effort, the region and its individual municipalities

DAILY INBOUND AND OUTBOUND COMMUTER TRAFFIC FOR CHRISTIAN COUNTY



Sources: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2002-2010.

ANNUAL SALES TAX RECEIPTS



Sources: City of Nixa, City of Ozark, 2003-2012.

aim to create more employment opportunities for their residents by supporting its existing employers and attracting new employers to the region.

By embracing a shared vision and taking steps to deliberately shape the region’s economic future in each municipality and in the county, the region can become a destination not just for families in the region but also for business. This balanced approach to growth is necessary to secure a positive outlook for Christian County and its municipalities.

This plan outlines a vision and guiding principles for accomplishing that initiative. It then identifies goals, strategies, and actions to achieve this vision. A summary of the plan is provided in the box to the right.

SUMMARY OF THE PLAN

Vision for Economic Development:

*Christian County will become a destination for high-quality **talent** and innovative **employers** in the Springfield region.*

Goals:

- GOAL 1.** Ensure that Christian County communities have the **resources** needed to support business expansion, formation, and attraction.
- GOAL 2.** Provide a **regulatory environment and the infrastructure** to support the creation of employment centers across the county.
- GOAL 3.** Build a strong sense of identity in Christian County as a **magnet for talent** in the Springfield Region.

Priority Projects:

- Regional**
 - › Back-Office Medical Operations
 - › Gigabit City
 - › Highway 14 Activity Hub
- Nixa**
 - › Expansion of Industrial and Business Sites
 - › Retail Recruitment
 - › Family-Oriented Entertainment Destination
- Ozark**
 - › Downtown Revitalization
 - › Highway 65 Corridor Development
 - › Air Park South Development

SWOT ANALYSIS

To better understand the region and the role it plays in the greater Springfield Area, we conducted an economic assessment. We supplemented this quantitative snapshot with public input from interviews and focus groups with key stakeholders. We then applied a strategic lens, based on our knowledge of national economic development practices and trends. The result is summarized in the table to the right – Strengths, Weaknesses, Opportunities, and Threats (SWOT). From this base of information, we developed a framework to capitalize on opportunities while being mindful of the primary threats.

North Christian County’s greatest strengths are its proximity to Springfield and Branson, its educational institutions, and the strength of the healthcare sector locally and regionally.

The greatest weakness for the region is its position as a bedroom community and the challenges associated with that. Most importantly, a tax base highly dependent on residential property threatens the fiscal sustainability not only for the local governments of the region but also for the school districts.

As a result, **balancing the tax base** is of vital importance to protecting the region’s greatest asset and securing the region’s future.

STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> › Location: proximity to Springfield & Branson › Accessibility: 2 airports and Interstate access– Springfield (≈20 miles), Branson (≈40 miles), I-44 (≈15 miles) › Workforce & Education: population is young, highly-educated workforce, competitive wages, high quality public schools, OTC campus › Economy: strength of healthcare (regionally), relative stability in terms of employment › Quality of life: low cost of living, affordable residential property values, low crime rate 	<ul style="list-style-type: none"> › Creating an organization to spearhead economic development › Better support for business located in the county › Sites to accommodate larger retail and office users – high quality / 25,000+ sf › Highly skilled medical workforce commuting to Springfield › Public-private partnerships to catalyze desirable development › Growth of OTC’s Richwood Valley Campus & “skills gap” training center › Support for entrepreneurs and accelerating development cycle
WEAKNESSES	THREATS
<ul style="list-style-type: none"> › Bedroom community: high % of residents that work in Springfield, low daytime population, retail leakage, residents’ connection with Springfield over Nixa / Ozark › Transportation: lack of Interstate, east-west connections, Nixa’s north-south corridor, Ozark’s lack of dedicated revenue to fund transportation › Infrastructure: much of undeveloped area without services, cost of fiber high › Real estate & development: commercial vacancy high (office & industrial), diversity of product types, large landowners not interested in selling holdings › Entertainment: few destinations to attract visitors and anchor residents 	<ul style="list-style-type: none"> › Competition from existing regional partnerships › Dependency on sales tax and development fees › Retention of high quality talent out of regional higher education institutions › Traffic and rising gas prices encouraging people to move back into Springfield › Retail competition with South Springfield and Branson › Branson’s dependency on tourism

VISION AND GUIDING PRINCIPLES

A strategic plan must establish a common vision that provides direction for the goals, strategies, and actions that form the bulk of the plan. A vision also provides direction for the economic development players in the region, which will help sync their efforts and result in a better coordinated and more effective economic development initiative. For Christian County, we crafted a vision to propel the region towards its objective of balanced growth and self-sufficiency:

***Christian County** will become a destination
for high-quality **talent** and innovative **employers**
in the Springfield region.*

This vision builds on Christian County's status as a destination for families in Springfield and highlights its aspirations for growing and attracting employers. It implies that creating economic opportunities for residents is as important as creating conditions that attract talent.

Becoming a "destination" will require a concerted effort on the part of all involved in economic development in Christian County. It requires that Christian County and its municipalities aim to stand-out in the Springfield region as an attractive place to do business and live. The following characteristics can help Christian County reach the status of "destination:"

1. Provide valuable assistance to existing employers and prospects
2. Have world-class workforce resources, including the highest quality schools
3. Have outstanding shovel-ready sites
4. Have an appealing quality of place for a good value
5. Have a welcoming business climate
6. Have forward-looking zoning and infrastructure planning to promote balanced growth

It is with this vision and these characteristics in mind that the goals for the strategic plan were structured. The three goals below provide the framework for realizing the vision to become a destination:

- GOAL 1.** Ensure that Christian County communities have the **resources** needed to support business expansion, formation, and attraction.
- GOAL 2.** Provide a **regulatory environment and the infrastructure** to support the creation of employment centers across the county.
- GOAL 3.** Build a strong sense of identity in Christian County as a **magnet for talent** in the Springfield Region.

The first goal focuses on resources and programs needed to provide top notch economic development and business assistance services to existing and prospective employers. The second goal focuses on the business climate and infrastructure of the county and proposes mechanisms for making it more competitive and forward-looking. The third goal focuses on the county's key assets and quality of place. While each of these goals is important in and of itself, it should be noted that they reinforce one another. In fact, neglecting one of the goals would likely have detrimental effects on the others. Conversely, progress in one goal area will likely enhance the region's ability to make progress toward achieving the other goals.

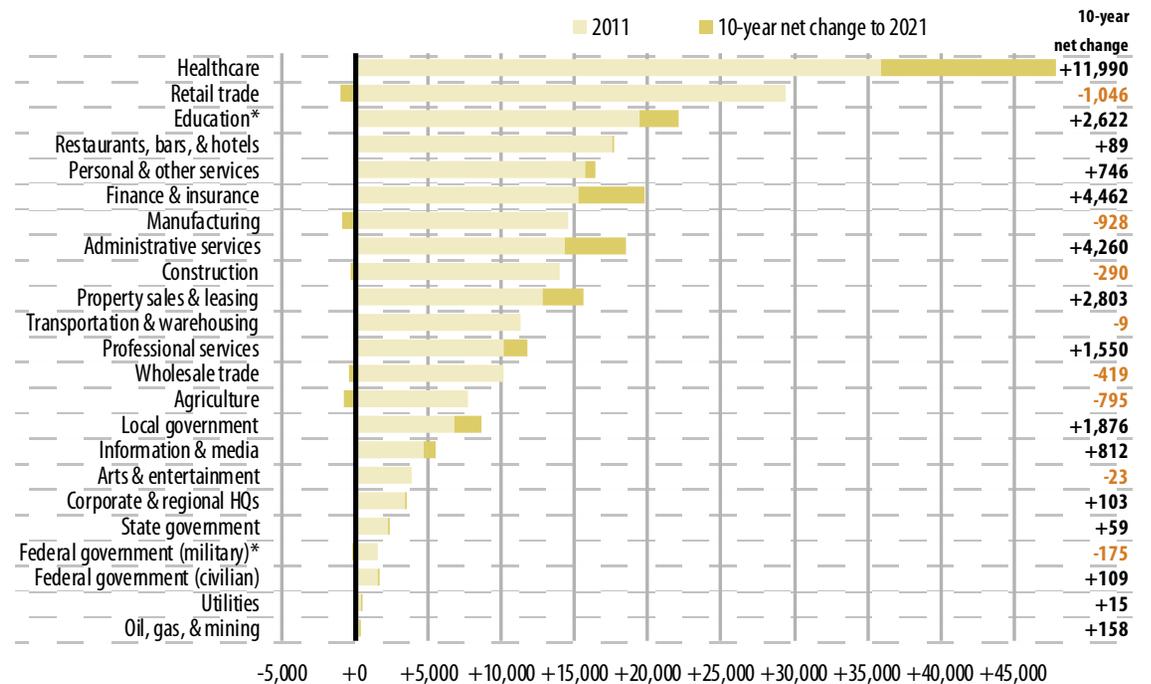
Goal One. Ensure that Christian County communities have the resources needed to support business expansion, formation, and attraction.

To meet the goal of balancing its tax base, Christian County and its municipalities must grow its business community. "Growing the business community" means supporting existing employers as well as start-ups and small businesses. It also means looking for opportunities to recruit new businesses to the region. For Christian County to provide this support and take advantage of these opportunities, it must be prepared and be proactive.

First, the programs, projects, and activities necessary to support and assist business in the region require dedicated resources. It requires building relationships and networks that must be kept active. It requires expertise and specialization. The municipalities of Christian County and the County itself should commit resources to this end. These individual efforts, however, should coordinate with one another to maintain open communications and to be able to capitalize on regional opportunities.

Secondly, Christian County and its municipalities must position itself to take advantage of Springfield's economic growth, not just its population growth. Springfield's growth over the next 10 years is expected to be driven by the expansion of healthcare, finance and insurance, and administrative services. These projections are based on past sector performance and could be affected by the marketing and recruitment activities of the Springfield Area Chamber. The chamber is targeting its marketing efforts towards datacenters, distribution and logistics, call centers and back office, technology innovation, power intensive manufacturing, corporate office, and medical research.

SPRINGFIELD MSA'S JOB BASE IN 2011 + FORECAST 10-YEAR CHANGE



NOTE: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government; military includes active duty as well as reserves.

Sources: EMSI Complete Employment- 2012.2.

Of these targets, back office projects would be particularly well-suited for the more urbanized areas of Christian County. For Christian County and its municipalities to position itself to capture a significant share of this growth, it must be able to respond quickly and professionally to prospects looking for real estate in the Springfield Area.

Strategy 1.1. Mobilize the resources needed to lead and manage economic development in each individual municipality and the County.

Currently, Christian County and the Cities of Nixa and Ozark do not have formal economic development programs. In order to diversify the tax base and create more fiscally sustainable communities, the cities and the County need to devote resources specifically for economic development, build the capacity internally to manage a formal program, forge strategic partnerships with local stakeholders to leverage economic development resources, and actively pursue opportunities. While each jurisdiction will have its own program, collaborating regionally will be necessary for each community to optimize its investment in economic development and for Christian County communities to reach their collective vision of standing out in the Springfield region.

- i. Formalize an economic development program to implement the Economic Development Strategic Plan locally.
 - a. Commit the human and financial resources necessary to professionally manage an economic development program. These resources should include dedicated staff with planning and development expertise and the capacity to manage projects.
 - b. Forge partnerships with the local chambers of commerce and other parties, such as the school districts and the OTC, to coordinate economic development activities and leverage the city's / county's resources.
 - c. Formally adopt the Economic Development Strategic Plan and accept responsibility for implementing the plan.

ECONOMIC DEVELOPMENT: ROLES & RESPONSIBILITIES

Municipalities individually will serve as the points of contact for economic development in each jurisdiction, lead their business retention and expansion programs, assist businesses located in or considering moving to their jurisdictions, ensure prime real estate products are available and promoted, manage relationships between the various economic development stakeholders, and promote their image in the Springfield region and beyond. They will also manage their economic development tool boxes, planning / zoning / permitting processes, infrastructure investments, and catalyst projects specific to their communities.

The Christian County Economic Coalition will service as a coordinating body for economic development in the county to provide a forum for communication, information sharing, and collaboration.

The Springfield Area Chamber of Commerce will promote the Springfield region to a national and international audience and refer appropriate prospects to the Economic Partnership. It will also advocate for the county at the state and federal levels.

Chambers of Commerce will be in charge of membership services, supporting the needs of their small business members, and advocating for business interests at their city.

- ii. Organize the Christian County Economic Coalition (CCEC) to provide for more coordination of regional economic development activities.
 - a. Meet on a quarterly basis, or as needed, to exchange information on regional economic development issues.
 - b. Identify projects with regional significance and work to advance these projects. A potential project could include the Work Ready Community Initiative (*See Strategy 3.1*).
 - c. Create a common legislative agenda and advocate jointly for the County and its municipalities on regional issues.
- iii. Purchase and/or develop the basic tools to support the operation of a formal economic development program.
 - a. Create an interview template and survey for business visitations (*See Strategy 1.2*)
 - b. Complete an inventory of available sites (*See Strategy 1.3*)
 - c. Evaluate and purchase a customer relationship management system (*See Strategy 1.4*)
 - d. Develop informative and professional websites (*See Strategy 1.5*)
 - e. Establish a strong relationship with the Springfield Area Chamber of Commerce.

Strategy 1.2. Launch a business retention and expansion program to support existing and new businesses

Many communities have embraced a “grow your own” strategy for economic development in lieu of placing emphasis on business attraction. They have found the dividends are higher for programs that support existing business and new companies for a number of reasons. First, a community’s most reliable source of job creation is existing companies, which are also the greatest economic threat should they close or relocate. Second, the program’s cost per job created is often significantly lower than the cost per job recruited.¹ Finally, existing business and entrepreneurs already have roots in the community and often form the backbone of a community’s civic leadership. There is less risk that the firms will relocate to the highest bidding community when the time comes for future expansions.

The core of the recommended economic development programming should focus on existing and new businesses. With limited resources, the new economic development programs will get the most value by strengthening their relationships with existing businesses, keeping tabs on the pulse of the business community, and serving as a connector between local businesses and the resources and information they need to succeed.

¹ According to an evaluation of GrowFL by Tucker / Hall Inc., the cost per job of Florida’s statewide economic gardening pilot program was just under \$2,500. According to the Pew Center of the States, some tax incentives paid to companies relocating in states can be as much as \$20,000 to \$30,000 per job.

- i. Launch an employer visitation and survey program.
 - a. Identify the top 20 private employers to serve as the list of companies to visit.
 - b. Create a database of companies in the community using business registrations and licenses, chamber of commerce membership, as well as other resources. This database should be updated annually and used as a base for a formal or informal customer relationship management (CRM) system.
 - c. Establish a standardized protocol for visiting employers, including questions to ask during visits. Any data and information collected during interviews should be entered into a database so that the coalition can efficiently compare the company from one visit to the next, and also benchmark them with other companies. Coordinate this survey with the Missouri Department of Economic Development BRE initiative.
 - d. Develop an online employer survey to collect information on business climate and outlook. Administer this survey to local companies each year.
 - e. Communicate findings of survey and visits with stakeholders and track trends over time.
 - f. Use the information collected through surveys and visits to strengthen marketing messages to prospective companies about the benefits of locating in the community.
- ii. Train a business concierge to help local companies make connections with needed resources in the Springfield area and the state.
 - a. Research and understand resources available to support businesses. Make contact and develop a relationship with these resources to create a strong network.
 - b. Conduct outreach to local businesses to make them aware of the concierge services available to them. Utilize tools such as electronic newsletters, press releases, and social media.
 - c. Connect businesses with each other, relevant information, and needed resources.
 - d. Integrate services with the business assistance team (see Strategy 1.4).
 - e. Build support for a co-working and entrepreneur's hub.

BUSINESS CONCIERGE EXPLAINED

The needs of emerging businesses are the same everywhere: *Who are the players in my industry? What resources are available to me?* One of the best means for nurturing new businesses is to provide concierge services. The ability for a firm to have access to up-to-date information and contacts within their region is important for competitiveness. A business concierge, often an individual or collection of existing staff within an economic development organization, is a service through which local businesses can be connected with other businesses and resources in the region.

Examples of business concierge programs can be found in:

Thornton, Colorado

<http://www.businessinthornton.com/For-Existing-Businesses-Business-Concierge.aspx>

Paducah, Kentucky <http://www.entrepaducah.com>

State of Iowa

<http://www.iasourcelink.com/resources/business-concierge>

- iii. Train a workforce concierge to ensure that employers can find the human resources they need to operate in the county.
 - a. Participate in the Christian County initiative to become a Work Ready Community (*see Strategy 3.1*).
 - b. Build relationships with the Ozark Region Missouri Career Center, higher education institutions, school systems, and other workforce development stakeholders to understand their programs and offerings available to employers.
 - c. Monitor hiring difficulty of key occupations using resources such as Wanted Analytics or surveys of employers in the Springfield region and identify major talent recruitment challenges.
 - d. Maintain a repository of best practices in talent recruitment, development, and retention to support local employers.
 - e. Work with employers who are having difficulty recruiting talent to catalogue their current and anticipated needs.
 - f. Serve as the liaison between employers and workforce development groups to communicate employers’ needs and jointly craft solutions to meet those needs.

Strategy 1.3. Ensure that the county has real estate “product” to meet the needs of expanding and relocating businesses

One of Christian County’s advantages is the abundance of land that could be developed. Though the ownership of the land and its topography do pose challenges in some areas, a handful of well-situated greenfield sites could help position Christian County communities as the suburban destination in the Springfield region. Just as the inventory of residential lots and housing products facilitated the population boom in Christian County, an inventory of sites for larger employers will enable the development of the county’s employment base.

- i. Work closely with Springfield Area Chamber of Commerce to identify where there are gaps in their product inventory that could be filled by sites in the suburban sub-market.
 - a. Meet with local landowners and developers to identify the best sites to fill these gaps.
 - b. Consider identifying a prime site to take through MoED’s site certification requirements. Currently, there are 15 certified sites in Missouri, only one of which is in the Springfield region – a 51 acre site in Partnership Industrial Center West.
 - c. Highlight these sites in the parcel inventory (See below).

RECOMMENDED TARGET INDUSTRIES

For Christian County, we identified target industries. These targets were chosen because they dove-tail with the targets of the Springfield Chamber of Commerce and because they represent good opportunities for the county. The targets are:

- › Healthcare
- › Back-office, in particular healthcare-related
- › Medical software
- › Growth-oriented small business
- › Family-oriented retail and entertainment

- ii. Keep an updated inventory of parcels available and a map of where the parcels are located.
 - a. Review available sites in the community and collect standardized information about each site, including information commonly used by site selectors. Store information in a format that is easily accessible and shared.
 - b. Based on the profiles and information collected on the sites, note any sites with infrastructure needs and create plans to meet those infrastructure needs.
 - c. Keep site information current in MoED's searchable database of sites (LOIS). Only 10 of the sites listed in Christian County are more than 10 acres. Few of these sites have much information available beyond the acreage and perhaps a short description. Be sure that as much information as possible is provided about sites in Christian County.

- iii. Encourage the development of a business park over the next 5 years to support the growth of a regional employment centers in Christian County.
 - a. Identify a 300 to 400 acre site located centrally in the county to develop as a mixed-use business park that would create a suburban central business district in Christian County.
 - b. Explore the possibility of a multi-jurisdictional park to facilitate public participation in the project, create a more robust product, and encourage regional collaboration. *(See article from the Economic Development Journal in Appendix E)*
 - c. Partner with a private developer experienced in successful business park development.
 - d. Secure an anchor to act as a catalyst in attracting other tenants.

Strategy 1.4. Implement a relationship management system for prospective and existing employers seeking assistance

A relationship management system will help communities manage their interactions with current and prospective employers. Gathering and organizing information will allow the communities to keep track of the needs of businesses, coordinate with partners, and potentially automate processes. The following actions are recommendations for optimizing the implementation of a relationship management system among Christian County communities:

- i. Evaluate and choose a web-based customer relationship (CRM) management system for the economic partnership to use.
 - a. Establish a protocol for gathering information about local businesses so that information is stored in a systemized fashion.
 - b. Designate a single point of contact that collects basic information from employer regarding its needs.
 - c. Make the system accessible for viewing and editing by other people involved in the business assistance process.
- ii. Create a structure for forming response teams that address the needs of the employer seeking assistance.
 - a. Assemble a pool of decision-makers in the community.
 - b. Train the pool of team members on the goal of the program and team member expectations.
 - c. Based on the specific needs of the employer, put together a team of three or four community representatives that will come to the table with the employer to design a customized response.
- iii. Provide top notch customer services to businesses seeking assistance.
 - a. Shepherd the employer through any necessary processes (development, incentives, etc).
 - b. Provide the business with personal introductions to any individuals they will need to coordinate with.
 - c. Form a response team, if needed.

CRM SYSTEMS FOR ECONOMIC DEVELOPMENT

The cost of CRM Systems can vary widely. A handful of CRM tools have been customized for economic development. However, many economic developers use free or low-cost tools and customize them for their own needs. Below is a list of CRM tools that economic developers recommend.

Solutions Specific to Economic Development

- › EcoDev Tracker
- › Executive Pulse
- › c9 Economic Development CRM
- › Atlas Prospect Management

Other CRMs Used by Economic Developers

- › Zoho CRM
- › Sugar CRM
- › ACT!
- › SalesForce
- › MS Dynamics CRM

- d. Track the employer’s progress from start to finish and record results and outcomes in the CRM system.

Strategy 1.5. Identify opportunities to market and promote Christian County to an external audience

While the first priority of the local economic development programs is not marketing, opportunities to participate in cost-effective marketing activities may arise, and the communities should be prepared.

- i. Prepare a brochure, a professional website, proposal template, and an information packet that features Christian County and its municipalities as well as the new organization.
 - a. Convene a group of community representatives with marketing experience to craft a message and talking points that tell the story of Christian County and why it stands out as a destination in the Springfield region.
 - b. Use a professional firm to prepare a brochure, website, proposal template, and information packet to be used for marketing purposes. A firm with specific knowledge of economic development marketing would be of benefit.
 - c. Design an e-newsletter template that can be used to communicate with stakeholders and marketing audiences.
- ii. Leverage the community’s relationships with local businesses to make contact with businesses who might consider relocating to Christian County.
 - a. Encourage stakeholders and business owners to act as ambassadors, reaching out to their network of suppliers, customers, and peers to sing the praises of doing business in Christian County.
 - b. Cultivate relationships with local businesses who can be Christian County’s evangelists to the outside business community. This should be one of the secondary goals of the business visitation program (*See Strategy 1.2*).
 - c. Educate the local businesses on what kinds of assistance is available to businesses, and make sure they communicate this knowledge to their contacts that may be looking for a site to expand or relocate.
 - d. Have the local businesses and business ambassadors send any referrals to the appropriate program.

ECONOMIC DEVELOPMENT PROPOSALS

One of the roles of the economic development program managers will be to respond to Request for Proposals from companies looking to locate in the Springfield Region. Each program should design a template that includes the following sections:

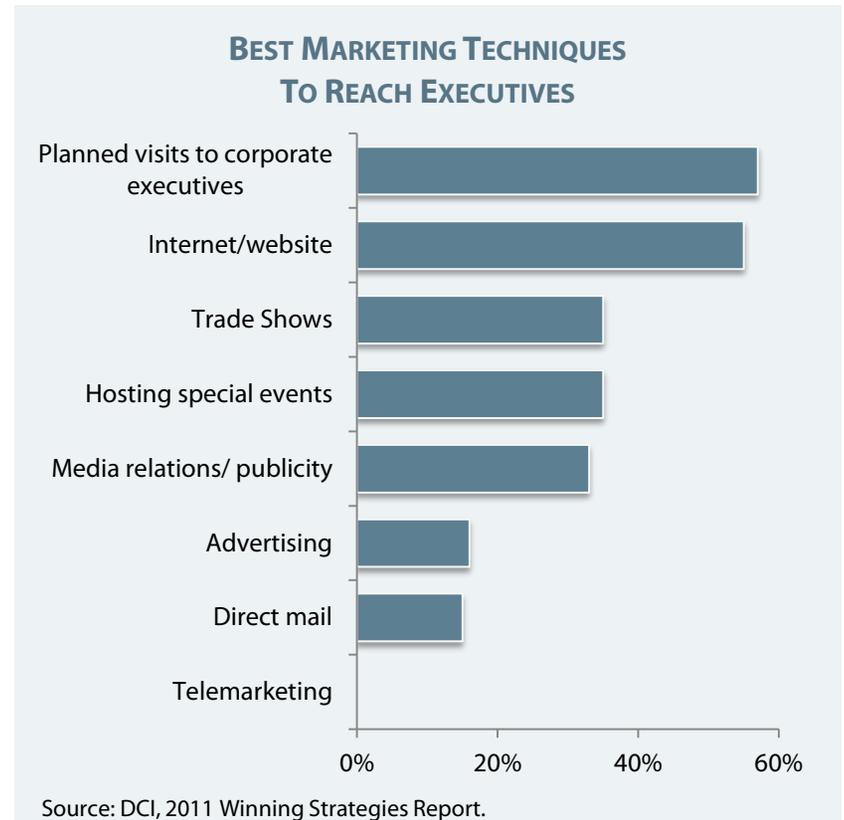
- › A community profile: description of the community, demographic, economic, and workforce information, utility rates, telecommunications access, etc.
- › Site information: available sites, maps, infrastructure availability.
- › What you and your partners are prepared to offer: incentives, infrastructure assistance, infrastructure investments, workforce training, utility rate discounts.

- iii. Be selective in marketing activities to maximize scarce funding.
 - a. Participate in prime co-marketing initiatives with the Springfield Area Chamber and the State of Missouri.
 - b. Identify one to two trade shows to attend and raise awareness of Christian County as a place to do business.

Strategy 1.6. Communicate with Christian County residents about the importance of economic development

Currently, many of the stakeholders in Christian County hold the image that economic development means luring large employers with high dollar tax incentives. Others believe economic development is enhancing city services through activities such as building sidewalks and resolving traffic issues. While these can be components of an economic development program, we recommend a more holistic approach, emphasizing support for existing businesses, ensuring that business can and want to grow in Christian County, and enhancing the quality of place in Christian County. The explanation of this approach is an important message to communicate with stakeholders. In addition, the case for a formal economic development program with adequate resources must be made. Careful messaging will help to make this case. Recognizing the importance of the school districts in Christian County, the message should be that tax base diversification is vital not only to the health of the community but also to the continued success of the public school system.

More importantly, Christian County and its communities need influential “champions” of economic development, who are vocal about the importance of investing in and supporting economic development initiatives and who are willing to take ownership of projects and leadership positions. Grooming these kinds of “champions” should also be a goal of the local economic development programs and the Christian County Economic Coalition’s communications and outreach strategy as well.



- i. Publish articles in local media celebrating economic development successes.
 - a. The local newspapers – The Christian County Headliner News and the NixaXPress – are important allies in making the case for economic development. The communities and the CCEC should submit press releases and work regularly with local media outlets to raise awareness of its intentions and good work.
- ii. Provide regular communications with residents to build awareness of economic development activities, projects, and successes.
 - a. Establish a Facebook page and Twitter account.
 - b. Encourage residents to join these networks.
 - c. Publish an eNewsletter regularly, and promote it through these social media outlets.
 - d. Post pertinent articles and important information on these feeds to keep residents informed and engaged.
- iii. Participate in the Springfield Chamber’s visitation program to peer communities to educate local leaders on best practices for economic development.
 - a. Encourage stakeholders and community leaders to join the Springfield Chamber’s Community Leadership Visit.
 - b. Schedule separate meetings with peer communities near the leadership visit destination to also learn how peers are addressing challenges common to suburbs.

SPRINGFIELD AREA CHAMBER’S COMMUNITY LEADERSHIP VISITS

For each the past 18 years, a delegation of Springfield community leaders has traveled to a peer city to learn from the experiences of another community and to bring back ideas that will benefit the Springfield region. The last 5 destinations included:

- > Fort Collins, Colorado
- > Tupelo, Mississippi
- > Grand Rapids, Michigan
- > Madison, Wisconsin
- > Knoxville, Tennessee

Goal Two.

Provide a regulatory environment and the infrastructure to support the creation of employment centers across the county.

While Goal One outlines a work plan and strategies for organizing the local economic development programs, Goal Two focuses on how the public sector in Christian County can ensure the conditions are present for businesses and residents to thrive.

Christian County and the Cities of Ozark and Nixa have done a commendable job managing their explosive growth over the past decade. This careful growth management has, in large part, perpetuated and improved the high quality of life that has drawn families out of Greene County. The collaboration of the two cities to create consistent development codes and development procedures has created a hospitable regulatory environment. In addition, the Urban Service Area Agreement between the incorporated communities in the county and Christian County demonstrates the collaborative approach that has enabled these parties to manage their growth more effectively. The result has been more compact and contiguous development in Northern Christian County. This willingness to work together will continue to be an asset to the area.

Promoting the growth of the commercial and industrial tax base in the region will require even greater collaboration. Development, both real estate and business, takes place in a competitive environment. For Christian County to capture a greater share of employers and commercial development, it must stand-out in the Greater Springfield Region. Standing out will require Christian County and its municipalities to build upon its foundation of good practices to differentiate the area in the eyes of the business and development communities. It will require fanatical customer service, high quality sites, a visionary plan, and continuous coordination.

URBAN SERVICE AREA OVERLAY DISTRICT

In 2008, Christian County and the cities of Nixa and Ozark adopted the Urban Service Area Overlay District. The intent of the agreement was to promote better growth management in the county through the coordination of land use, transportation, infrastructure, and natural resource planning between governmental entities. In addition, the agreement promotes greater densities in urban areas to afford more efficiency in the delivery of services. The agreement also provides more predictability to land owners and residents about the location of future public services and urban level densities.

Strategy 2.1. Continue to seek ways to collaborate on infrastructure, growth management, and development issues.

As mentioned earlier, Christian County and the Cities of Nixa and Ozark have created a strong foundation of collaborative policies that promote high quality development and growth in the county. The local governments should continue to seek innovative ways to manage growth, finance infrastructure improvements, and coordinate development.

- i. As part of the CCEC, include a sub-group of city managers, county administrator, and planning directors.
 - a. Meet regularly to share information of policies, initiatives, and projects that will be of regional significance and influence economic development.
 - b. Track how other cities and counties are collaborating and supporting each other across the nation, discuss any best practices in the group, and adopt any applicable practices that would give Christian County an advantage.
 - c. Reach out to other municipalities in Christian County to engage them around collaboration and coordination.

Strategy 2.2. Monitor the business climate to maintain a friendly atmosphere that provides the area with a competitive advantage

A culture of collaboration and customer service can go a long way in creating a positive business climate. Often, local governments fall into an adversarial relationship with developers and businesses around regulations, the permitting process, and planning and zoning. Communities that overcome this obstacle by laying out transparent and predictable parameters and offering customer-service-oriented assistance encourage private investment in their communities without having to relax their standards. Avoiding the “us versus them” mentality can enable local governments to become partners in projects, rather than impediments.

- i. Review and evaluate the development processes of the community.
 - a. Start by comparing development processes in the community to those of the rest of the region, and identify strengths and weaknesses of the processes in the community. Prepare a matrix that shows a comparison of the different entities’ processes across the most important characteristics.
 - b. Invite key developers and businesses in the Springfield region to provide input about what works well and what does not.
 - c. Examine communities in the region and beyond who stand out and identify best practices.
 - d. Make recommendations on how to tweak the development processes to make them more user-friendly. These recommendations should focus on process, culture, and how to work together better, not on relaxing development standards.
- ii. Create a culture that is customer-service oriented to encourage a partnership between the public and private sectors that yields a high standard of development while maintaining a positive relationship with the developer and business communities.
 - a. Train county and city staff on how to better assist their clients, and make sure the knowledge base and interpretation of the development code and ordinances are consistent across staff.
 - b. Identify ways to expedite the development process by relieving bottle necks and looking for ways to make the process more efficient.

- c. Ensure a predictable development process by clearly outlining the process and requirements so the expectations of staff and the client are well-understood by both sides.
- iii. Track the economic development initiatives, policies, and incentives of other municipalities in the region to maintain competitiveness.
 - a. On an on-going basis, collect information on other municipalities in the region.
 - b. Understand the strengths and weaknesses of the different communities in Christian County in terms of the business climate.
 - c. Identify and address any notable weaknesses or differences.
- iv. Develop a transparent incentives policy that outlines the tools and procedures available to encourage desirable development.
 - a. Each locality should develop its own incentives policy based on the tools they have available.
 - b. Build safeguards into the policy to make sure the interests of the locality are protected and the milestones negotiated in each incentives agreement are met before payments are made.
 - c. Incorporate a cost-benefit analysis into the decision-making process to ensure that participating localities will earn a return on their investment.

DEVELOPING AN INCENTIVES POLICY

Incentives policies should be carefully crafted in a manner to ensure they yield a net benefit to area taxpayers. An incentives policy helps to insulate organizations from criticism and political pressure when making the decision of whether or not to support a prospect. The following standards should be included in the policy as necessary conditions for incentives to be considered: 1) the targeted investment would not occur without the incentive and 2) the investment should generate new economic activity in the area instead of displacing existing businesses.

The policy should require the following factors be documented as part of any incentives package:

1) Justification of how the proposed incentive relates to the broader economic development strategies and what conditions the company must meet in order to receive the incentive.

2) A formal economic impact analysis weighing the estimated direct/indirect benefits (e.g., tax base enhancement, increase in retail sales, increase in wage rates) against the incentive costs (e.g., tax abatements, training subsidies, infrastructure improvements) associated with a particular deal. An overview of economic impact tools can be found here:

<http://sogpubs.unc.edu//electronicversions/pdfs/cedb7.pdf>

3) A “claw back” agreement that guarantees the recovery of incentives funds if the firm does not meet pre-established milestones.

Finally, the policy should outline how the return on investment (ROI) will be measured and require that the ROI be tracked over the life of the term of the incentives.

Strategy 2.3. Designate significant employment centers in the county

For Christian County to become more self-sufficient, it must provide more employment opportunities, not only for residents in the county, but also for those in the surrounding areas. In other words, Christian County must become an employment center that imports labor from other areas rather than exporting its own labor force. This transformation will not happen overnight, but the pieces to achieve this goal must be put in place early. Doing so will enable the county and its local governments to play a role in the transformation, influence the outcome, and possibly expedite the process.

- i. Choose two to three areas in the county to be designated as primary employment centers.
 - a. Work with planning staff as well as the development and business community to identify the areas that are best positioned to become employment centers. Hwy 14 would be a logical candidate due to its east-west connections, the location of the OTC, and its distance from Springfield and I-44. The 200+ acre Air Park South tract could be another, shorter term, candidate due to its location near Hwy 65 and CC.
 - b. Choose at least one area that is positioned for development in the next 5

CASE STUDY: REGIONAL EMPLOYMENT CENTER

In 1990, the City of McKinney designated a 4,200 acre area as the Regional Employment Center (REC) in its future land-use plan. The area is located on Highway 121, which connects McKinney with the DFW International Airport. At the time, the City of McKinney was a town of 21,283 and becoming a bedroom community for commuters working in Dallas and Plano. The city recognized the future commercial value of this area of the city as being a direct connection to the region's largest airport, and they recognized the need for the city to deliberately and diligently work to balance its tax base. By 2000, McKinney had grown to 54,369 and much of these residents commuted outside of the city for work, and the REC area remained largely undeveloped.

In the early 2000's, a developer created a 2,200 acre mixed-use master planned community that incorporated much of the REC. Because of the overlay district at the REC and the infrastructure put in place, the developer integrated employment centers into the design and build-out strategy of Craig Ranch.

In 2009, Hwy 121 was expanded and became a 12-lane tollway, which greatly enhanced the commercial value of the land designated for employment centers in the REC. Though Craig Ranch had strategically attracted key anchors to the development to provide employment opportunities and amenities for residents, the market had not yet caught up. In 2010, Craig Ranch announced a partnership with KDC to develop part of the REC into a 185-acre Corporate Employment District. The City of McKinney has designated the district as the city's corporate center and is actively marketing the space through its economic development corporation.

In 2010, McKinney's population was 113,117, and it is still a bedroom community. However, had the pieces not been put into place to preserve these employment centers, the prime land would likely be strictly residential and the highway frontage parcels would be lower uses, such as car dealerships. After 20+ years, the market is beginning to catch up. The first tenant of the district – a corporate headquarters – opened shop in 2011.

to 10 years. The others can be longer term opportunities.

- ii. Put in place the tools and mechanisms to preserve these areas for commercial and industrial development that will support the goal of becoming an employment center.
 - a. Modify the applicable land-use plans accordingly.
 - b. Ensure that infrastructure plans prioritize these areas for service in line with the anticipated timeline.
 - c. Consider the creation of a special district to help finance improvements to the areas.
 - d. Educate landowners and developers on the importance of and opportunities around these centers.
 - e. Consider structuring a public-private partnership to promote the development of the area positioned for growth over the shorter-term.

Strategy 2.4. Ensure that capital improvement and transportation plans as well as funding support economic development priorities in the county

Currently, commercial and industrial development in the county is constrained by the availability of infrastructure in certain areas. Affordable access to broadband is inconsistent, which can be a major obstacle for the types of companies that would create employment opportunities most suitable for Christian County. Though infrastructure is not, for the most part, a significant issue for the major municipalities in the county right now, where and what the infrastructure projects are over the short- and long-term will greatly influence how and where the county develops. With a population that is quick to support funding for the school districts but hesitant to support additional funding for municipal and county services, the economic coalition and its public sector partners must mobilize to ensure that the county’s economic development priorities, funding resources, and infrastructure projects are aligned.

- i. Educate residents on the importance of forward-looking transportation and infrastructure planning and how this can be funded. *(See Strategy 1.6)*
 - a. Use local media sources to report on problems, current and future, as well as the solutions being considered.

FCC’S GIGABIT CITY CHALLENGE

The FCC has set a goal of deploying gigabit speed broadband in at least one community in each of the 50 states by 2015. The FCC chairman anticipates that Gigabit Cities would become innovation hubs and attract considerable investment. It would also allow communities without broadband access to leapfrog slower technologies and be at the forefront.

In most of the 42 communities that currently have gigabit broadband services; the push has come from local municipalities and utilities. In parts of Kansas City, Missouri and Kansas, Google has rolled out its gigabit broadband.

Thus far, communities that have made this investment have seen dividends. Chattanooga, TN’s gigabit fiber network helped attract Amazon and Volkswagen. Kansas City’s gigabit service for residential consumers has been attracting tech start-ups. In Lake Nona, a master-planned community in Orlando, FL, the developers have introduced gigabit fiber as the backbone of their “medical city” which is composed of hospitals, research institutes, and a medical school.

- b. Use citizen surveys to educate the general population and to gauge public opinion.
 - c. Invite influential community members to attend a workshop or series of workshops in which the problems are described and the members are tasked with formulating possible solutions. Have them formally adopt a solution, encourage them to promote this solution through their social networks, feature stories of the event in local media sources and in other communications tools.
- ii. Coordinate local capital improvement plans, public works projects, and planning and zoning with economic development goals.
- a. Convene staff (city managers, planning directors, etc.) from local governments to discuss priorities and projects.
 - b. Monitor public works plans to make sure they sync with economic development goals.
 - c. Revise public works plans, as needed.
- iii. Prioritize affordable access to high-speed internet.
- a. Create a Christian County broadband working group to “bird-dog” the issue, craft solutions, and actively participate in their implementation.
 - b. Evaluate the possibility of becoming a “Gigabit City” where the community’s access to gigabit speed broadband would become an eye-catching amenity for business. This could also be part of the infrastructure strategy of the Hwy 14 Hub.
 - c. Coordinate with SMCOG and MOBroadbandNow to identify programs to expand broadband access and opportunities for collaboration.
 - d. Consider providing access to open trenches for providers to lay underground pipe to reduce the cost of laying fiber in the future.
 - e. Explore the possibility of utility-owned fiber networks (See *Strategy v below*).
- iv. Advocate to secure funding for improvements to Highway 14 as well as other priority infrastructure projects.
- a. Include improvements to Highway 14 on the region’s legislative agenda(s).

MUNICIPALLY-OWNED UTILITIES AND ECONOMIC DEVELOPMENT

Municipally-owned utilities can contribute significantly to economic and business development in a community. The ways in which they do this are by supporting businesses with favorable rates and providing valuable assistance to businesses, such as energy efficiency programs, rebates, and financing. In addition, the localization of decision-making and orientation towards customers rather than shareholders can also allow public power companies to offer benefits to industrial users.

Some innovative utilities have built their own fiber networks to offer high speed broadband access to their customers. While the investment is high and opposition from established telecommunications companies can be strong, the communities that have done this have experienced notable growth in their business base as a result of this access.

For more information, see the articles below:

<http://www.areadevelopment.com/AnnualReports/Winter2012/growing-business-APPA-public-power-262627778.shtml>

<http://www.ilsr.org/broadband-speed-light/>

- b. Leverage relationships with influencers at the state legislator to make sure that Highway 14 is prioritized for investment.
 - c. Continue to advance shorter-term corridor projects such as Hwy CC, Hwy 160, and interchange improvements.
- v. Partner with municipally-owned utilities to define ways the utilities can assist in economic development.
- a. Encourage utilities to structure programs to assist large energy users such as volume rate discounts or energy efficiency audits and rebates.
 - b. Invite utility representatives to participate in the CCEC and in the business assistance teams, when appropriate.
 - c. Work with utilities to provide infrastructure detail on available sites.
 - d. Evaluate the feasibility of a utility-owned broadband network. Examples of communities who have done this: Lafayette, LA; Chattanooga, TN; Bristol, VA; and Princeton, IL.

Goal Three. Build a strong sense of identity in Christian County as a magnet for talent in the Springfield Region.

Already the combination of a range of desirable housing products and high quality public education has put Christian County on the map as a destination for families in the Springfield Region. Ozarks Technical Community College's (OTC) Richwood Valley Campus serves as another educational asset in the region. Yet, the county could be more than just a place for families to sleep and kids to be educated.

Working to strengthen these two assets will solidify Christian County's position among families. It could also catch the attention of regional employers and begin raising awareness among the business community in the Springfield Region that Christian County is a significant source of talent and great place to do business.

Developing and attracting more assets and amenities that appeal to families will serve to reinforce this position, attract families as visitors, improve quality of place, and even increase the area's capacity to support retail. The focus of this strategy should be on assets and amenities that generate tax revenues (e.g. dining and entertainment venues) or that attract visitors who will spend dollars in Christian County. An event that attracts thousands of visitors to an isolated area for a short period of time with no connections with local vendors or establishments will not have the same impact as an event that incorporates local vendors, showcases the community, and encourages visitors to stay and eat dinner in the County.

Strategy 3.1. Become a Missouri Certified Work Ready Community

The state of Missouri was chosen to be one of seven states in the US to implement the Certified Work Ready Communities Initiative. This initiative helps communities in Missouri develop and document the skills of their workforce using ACT's National Career Readiness Certificate, which is a work-related skills credential, providing objective documentation of individual's skills that is accepted nationwide. Communities can become certified by assembling a leadership team, setting goals, applying to the program, and achieving those goals. As of February 2013, Jasper County is the only county in Missouri that is certified. Thirteen other counties in the state are formally participating in the program, including Clay, Henry, Pettis, Saline, Linn, Adair, Franklin, Jefferson, St Francois, Cape Girardeau, Butler, Ripley, and Howell. Becoming a Certified Work Ready Community can help Christian County stand-out as a source of talent in the Springfield Region.

- i. Organize and apply to be a participating community.
 - a. Organize a local leadership team consisting of the following individuals: chamber of commerce leader, economic development leader, elected official, education leader, community college leader, local workforce development leader, and business owner.
 - b. Develop and assess goals for worker certification that were established by MoDED and ACT.

- c. Develop a county plan to reach the goals to submit to the Certified Work Ready Community office.
 - d. Prepare the application for becoming a Certified Work Ready Community.
- ii. Work towards achieving goals within two years of application.
- a. Continue to hold regular meetings of the leadership team to track plan implementation and progress towards goals.
 - b. Recruit local companies to become a supporting business and recognized the NCRC credential.
 - c. Publicize the initiative to demonstrate regional cooperation and alignment of talent pipeline with employers' needs.
- iii. Continue to maintain certification.
- a. Continue to set goals, certify workers, and improve the skill level of Christian County's workforce.
 - b. Continue to engage employers in the program and encourage them to recognize the NCRC credential.

Strategy 3.2. Create a workforce training center of excellence to serve the Greater Springfield Region and beyond

Christian County is the home of a significant and growing portion of the Springfield MSA's workforce. Currently, the county supplies roughly 10% of the workforce, which represents about 31,000 jobs. Christian County is home to the 90-acre Richwood Valley Campus of Ozarks Technical Community College as well as two of the region's strongest school districts. With these resources in hand, Christian County has the opportunity to develop an innovative solution to address the region's workforce training needs.

- i. Assemble resources to create a pipeline of talent to support regional employers.
 - a. In partnership with the OTC, regional universities, and the Ozarks Region Workforce Investment Board, create a portfolio of interactive and experiential learning programs focused on preparing local workers for difficult-to-fill positions.
 - b. Through these programs, connect and engage students with employers.
 - c. Make programs dynamic and responsive to both employer and student feedback to ensure a product that meets both sides' needs.
- ii. Support the growth of OTC in Christian County.
 - a. Increase partnerships with 4-year institutions to offer more choices of 4-year degrees that can be obtained at the OTC-Richwood Valley Campus.
 - b. Work with local software developers to create programs at OTC that would support their human resource needs.
 - c. Increase the number of allied health programs and health administration programs to consolidate Christian County's position as a primary source of labor for the regional healthcare industry.

- iii. Collaborate with workforce development training resources to provide high school students with opportunities to interact with employers, learn about different careers, and pursue local employment post-graduation.
 - a. Champion programs aimed at education to employment initiatives, technology adoption, and life skills.
 - b. Organize periodic career days to educate students about different careers that will be in-demand when they graduate, what education and training is required for those careers, and what the financial rewards of those careers would be.
 - c. Offer both short-term and longer-term apprenticeships and internships to cultivate soft life skills and job skills in students.
 - d. Partner with training institutions to provide access to certificate programs and post-secondary coursework to high school students so that students have the opportunity to graduate with helpful credentials.

Strategy 3.3. Pursue additional entertainment venues, recreational opportunities, and special events that reinforce Christian County’s positioning as a destination for families

Christian County’s growth has been led by the in-migration of families to the area. Yet, most of the existing family-oriented activities and attractions are located in either Springfield or Branson. Growing Christian County’s base of family entertainment venues, recreational opportunities, and special events will not only encourage families to travel to the county to visit; it will also keep the families residing in the county (and their dollars) from leaving Christian County in search of activities. In doing so, this will strengthen and enhance Christian County’s reputation as a destination for families in the Springfield region.

- i. Nurture and expand special events that have a regional draw such as the Ozark Arts & Crafts Show, the Sertoma Duck Race, and Nixa Sucker Day.
 - a. Work with event organizers to ensure that each event effectively showcases the community well and offers a range of family-oriented activities.
 - b. Explore ways to maximize visitors’ length of stay at these festivals and ensure that they have opportunities to spend their activity dollars in the county.
- ii. Launch a strategy to attract family-oriented entertainment venues that would attract visitors and generate sales revenues.
 - a. Identify destination-type entertainment venues that are not present in the region.
 - b. Examine the markets that these venues are located in, and craft a case for locating in the Springfield region and in Christian County, in particular.
 - c. Approach the appropriate representatives from these venues. Invite them to Christian County for a tour and presentation in which the case is made to them.
 - d. Follow-up and maintain contact going forward to forge a relationship and stay top of mind when the venue looks to expand into new areas.
- iii. Continue to invest in recreational venues and events that encourage family participation.

- a. Contact the Branson Chamber of Commerce to explore opportunities to collaborate with them on their youth athletics strategy. A ball-field complex in Christian County could serve both the Springfield and Branson markets.
- b. Develop a cross-county trail system that connects the rivers and communities of Christian County. This would provide recreational opportunities for families and attract visitors to the county. It could start with expansions of the Ozark Park Trail and the James River Water Trail.
- c. Design a strategy around the James and Finley Rivers to promote river recreation, and connect river visitors with opportunities to spend dollars in Christian County at restaurants and stores.

AREA-SPECIFIC PROJECTS

The three goals and associated strategies outlined in the previous pages provide a framework for evaluating investment decisions and applying resources. Embedded in the strategies are projects that are meant to catalyze activity in Christian County and advance the county towards its vision. Within the plan, we included regional projects. We pull those projects out here and provide a more detailed description. We also profile projects that are specific to the cities of Nixa and Ozark. While these community-specific projects will likely have a regional impact, the individual communities will be largely responsible for their implementation.

REGIONAL PROJECTS

Back-Office Medical Operations. One of the most immediate prospects for the region is the location of a back-office operation. Over the course of stakeholder interviews, both large hospital providers in Springfield were receptive to the idea of relocating their non-medical operations to a location outside of their core hospital campuses. The non-medical operations could include accounting, billing, information technology, and human resources. The advantage of this for the hospital systems would be to free up space for medical service delivery in the hospital complex and possibly reduce the overhead costs associated with these back-office functions. For Christian County to attract a project of this type, it would need to ensure the availability of site(s) with excellent access for Springfield commuters, competitively-priced telecommunications access, high bandwidth and reliable telecommunications infrastructure, and cost-effective. Representatives of the communities and the CCEC should continue conversations with the hospital systems in the very near-term to ascertain the feasibility, make the case, determine more concrete project parameters, and forge a relationship.

A Gigabit City. Christian County has inconsistent access to high-speed broadband infrastructure. Some businesses reported great access and affordability while some reported prohibitively expensive broadband. There has been discussion among stakeholders of how to address broadband access, and the Southwest Missouri Regional Technology Planning Team completed a broadband strategic plan funded by the ARRA in May 2012. Providing high capacity broadband that meets the needs of businesses and institutions is a minimum requirement for expanding Christian County's employment base. Christian County's location between the Springfield Underground and Branson's Mountain Complex could be leveraged to provide better access.

The FCC has recently accelerated its goal of gigabit broadband access and increased its emphasis on gigabit access as the cornerstone of American innovation. Increased Federal interest could mean grant funding for under-served communities. It also means that this kind of broadband access will be increasingly available. Forward-looking communities, who have access to affordable gigabit broadband access, will be at a distinct advantage to those who do not. If an investment in broadband must be made in Christian County, the community will benefit from being forward looking. In addition, such high capacity broadband access would reinforce the prospects for back-office medical operations and could be one of the amenities to a Highway 14 Activity Hub.

Highway 14 Activity Hub. As the City of Springfield grows southward over the next 15 to 20 years and traffic along the north-south corridors increases, commuting will be less attractive to residents in Christian County. In addition, the price differential of a suburban location in Christian County could pique the interest of employers looking to expand in or relocate to the region. These factors, as well as the strong school districts, a primary OTC campus, and a high quality of place, can create market demand for a high quality office product in the Nixa-Ozark area.

Imagine an expanded OTC campus amidst a thriving commercial and business district with gigabit broadband. A back-office medical operation could be the anchor for a cluster of attractive suburban mid-rises. Community-oriented retail, restaurants, and entertainment options would be included within a walkable distance from the offices. A civic space with an adjacent park could be a centerpiece. Realizing a vision such as this will require the alignment of the area's land use plans with transportation plans and funding mechanisms. The region should plan for this possibility and do what it can to make it happen.

NIXA

Expansion of Industrial and Business Sites. The current industrial park in Nixa has limited capacity for growth. In addition, most of the industrial spaces available in Nixa are 25,000 to 50,000 square feet. While the vacancy rate for industrial space is relatively high currently, the ability to accommodate more and larger light industrial / flex uses in Nixa will better position the city to grow its employment base over the next 10 to 20 years. In addition, the city has less than 100,000 square feet of class B and C office space and no class A space. The city should work closely with local developers and landowners to explore the possibility of a multi-use park that would create an appealing sense of place and a strong center of gravity in the city. The old trailer park at South St and 160 should be evaluated for such a use. In addition, funneling business activity into the downtown, to the extent possible, and encouraging infill and redevelopment projects that complement the historic buildings and facades could create a unique hub. Raising the daytime population is of vital importance to all the communities in Christian County, but particularly to Nixa in its pursuit of sales tax revenues.

Retail Recruitment. Nixa currently has almost 1 million square feet of retail. Most of Nixa's retail spaces are strip centers and general retail. There are no community centers and few neighborhood centers. In addition, most of the available space is in the 10,000 to 25,000 square foot range. The city does, however, have a number of parcels of land that would be appealing locations for retail centers. With the vacancy rate high, particularly in the strip center category, the current appetite for retail development in Nixa is relatively low. However, the city can and should take steps to shape its retail future. Doing so will require an on-going and deliberate effort.



An example development in Rockville, MD.

The Buxton Report from 2005 highlighted the opportunities for Nixa that were dominated by family retailers. This segment of retailers is likely still a suitable target as Nixa’s demographics are more and more dominated by what customer segmentation studies classify as up and coming families. The specific retailers to target and retail trade statistics, however, have changed. Below are some suggestions for growing the retail sector of Nixa:

- Encourage a wider range of retail center types to improve the quality of place and neighborhood continuity. This can be done by cultivating relationships with developers, building development code, and incentives such as density bonuses.
- Take an active role in retail marketing and attraction by assembling useful information and reaching out to retailers. Inventory regional retailers to identify key retailers who are not present in the region but could be attracted to the demographic profile of the region (this should take into account the Battlefield area down to Branson). Take advantage of the Springfield Chamber’s LocationOne system to access ESRI data for updated retail trade and demographic statistics. Keep up to date data on retail space – inventory and availability – to have on hand to share with retail prospects. Seek opportunities to share expenses with marketing partners to attend ICSC and other retail-oriented trade shows. Develop and manage relationships with targeted retailers.

Family-Oriented Entertainment Destination. A niche for Nixa is certainly to play on its position as a destination for families. This is also an opportunity to attract families from the region to visit Nixa and spend their dollars. Springfield and Branson are both family-friendly cities and have just about every kind of family-oriented museum and attraction. Nixa should define a different kind of niche that would attract its residents on a weekly or even daily basis. An example of something that would fill this niche is the “food court” at a development in Austin, Texas called Southpark Meadows. This food court surrounds a courtyard that has an outdoor music venue, a splash pad for kids to play in, and ample protected areas to run around. The design attracts families from a wide trade area for playing, dining, and special events. It provides parents opportunities to socialize, kids opportunities to play, and the restaurants a large customer base.



OZARK

Downtown revitalization. Historic downtown Ozark has long been recognized as an asset in the community and has been targeted for revitalization. The City of Ozark was chosen as one of five DREAM communities in 2010 and continues to use the resources DREAM provides to advance its revitalization efforts. The City should continue to persist in its efforts to revitalize downtown. The county serves as one of the primary anchors that draw a large number of people downtown. The strategy of well-placed anchors is one that is embraced by shopping center planners but easily applicable to downtowns. Anchors are placed at intervals

across the shopping center; shoppers walk from one anchor to another, and are drawn in to the establishments that are between the anchors. The strategy creates traffic across the center. In downtown, people travelling from their employer to a restaurant to their residence will pass by other shops and establishments along the way, which creates a natural churn in traffic. The Finley River District, redevelopment of blighted areas, and infill projects offer opportunities to employ this same strategy.

Highway 65 Corridor Enhancement. Highway 65 is Ozark’s primary north-south artery, running from Springfield to Branson. It is also the primary gateway into the city, responsible for travelers and visitors’ impressions of Ozark. Traffic counts along this corridor are the highest in Christian County, which creates a great deal of potential for commercial development along this corridor. In Ozark, there are three diamond interchanges and high-capacity fiber optic cable. In some stretches, there are parallel roads as well. With these attributes, the corridor is one of the most appealing development areas of the city. Currently, the mix of uses ranges from industrial to retail to dining, but over-all the uses are relatively low intensity. There remain many development and redevelopment opportunities along the corridor. As Ozark and the county grow, this corridor will develop further as the backbone of the community and a major economic driver. The City should create a vision for this important corridor and put in place the tools to bring that vision to fruition. This could include such tools as overlay districts, special financing districts, façade improvement programs, zoning, and design standards. In addition, this should include a transportation plan that prioritizes the construction of parallel roads and east-west arterials that would open up additional land for development. This corridor plan should prioritize in the short-term capitalizing on the healthcare activity on the north end of the city and the redevelopment of the FASCO site. It should also include interchange beautification and gateway enhancements, the annexation of all Hwy 65 frontage between Hwy CC and Hwy F as well as the preservation of key sites to accommodate regional retail centers and higher intensity uses. This type of planning will allow Ozark to influence the mix of uses, the potential impact, and even the look and feel of the corridor.

Air Park South Development. Air Park South is a 200+ acre site near the Hwy 65 / CC interchange. In 2010, the Springfield-Branson National Airport Board, the owner of the property, requested the release of the property from Federal obligation due to its inability to purchase land needed to extend the runway for general aviation purposes. The property is now for sale and available for development. This property represents a very good opportunity for both the region and Ozark to create an employment center and attract employers to the region over the shorter-term, as noted in Strategy 2.3. Ozark and the CCEC should work with the Airport Board and the Springfield Chamber to understand the current market for the property and explore the feasibility of purchasing the property back from the Airport Board. In addition, the City should collect the information needed to get the site certified through the Missouri Department of Economic Development so that the site can stand-out as a shovel-ready site.

APPENDIX A: ECONOMIC ASSESSMENT

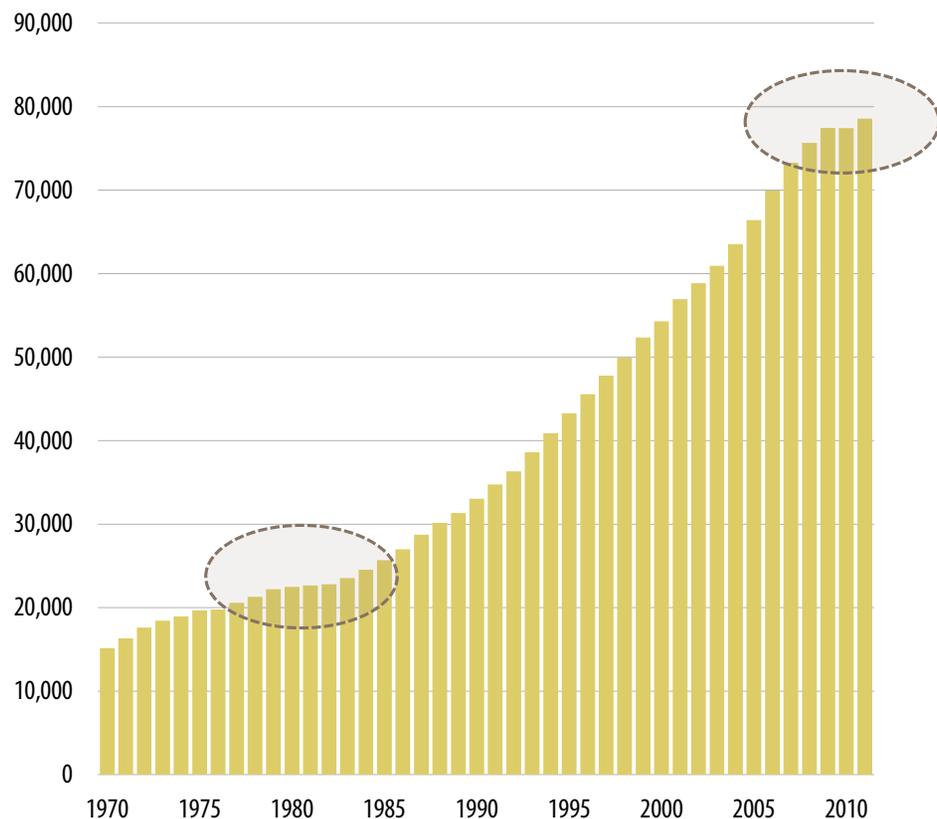
To provide a common framework for our recommendations, TIP began by compiling demographic and economic data on Christian County and the Springfield region. This analysis focused on the county in the context of the metropolitan area and the state where appropriate. The purpose is to understand the county's relative economic position and highlight its competitive advantages and disadvantages.



DEMOGRAPHICS

Christian County's population reached almost 79,000 in 2011, according to mid-year estimates from the U.S. Census Bureau. After years of fast growth, the county's population expansion recently stalled for the first time since the early 1980s.

CHRISTIAN COUNTY POPULATION



Source: US Census Bureau; Moody's Analytics.

	Compound Annual Growth Rate (CAGR)
1980 - 1983	1.6%
1984 - 2007	4.9%
2008 - 2011	1.3%

Between 1984 and 2007, Christian County grew at a compound annual rate of 4.9%. The annual rates of growth ranged between a high of 6.5% in 1987 and a low of 3.4% in 2002. In 2008, the annual rate of growth began to slow, stalling at 0% in 2010.

DEMOGRAPHICS

Between the 2000 and 2010 Census dates, Christian County picked up just over 23,000 new residents. About 8,000 of these were in Ozark and another 7,000 in Nixa. The pace of local population growth during this period was stunning—up 43% for the county overall, but 57% in Nixa and 84% in Ozark. This compares to moderate state population growth of 7% during the same period.

COMPARATIVE POPULATION CHANGE

The cities, county, and state over the past decade

	City of Nixa	City of Ozark	Christian County	State of Missouri
2000	12,124	9,665	54,285	5,595,211
2010	19,022	17,820	77,422	5,988,927
Net change	+6,898	+8,155	+23,137	+393,716
% change	56.9%	84.4%	42.6%	7.0%

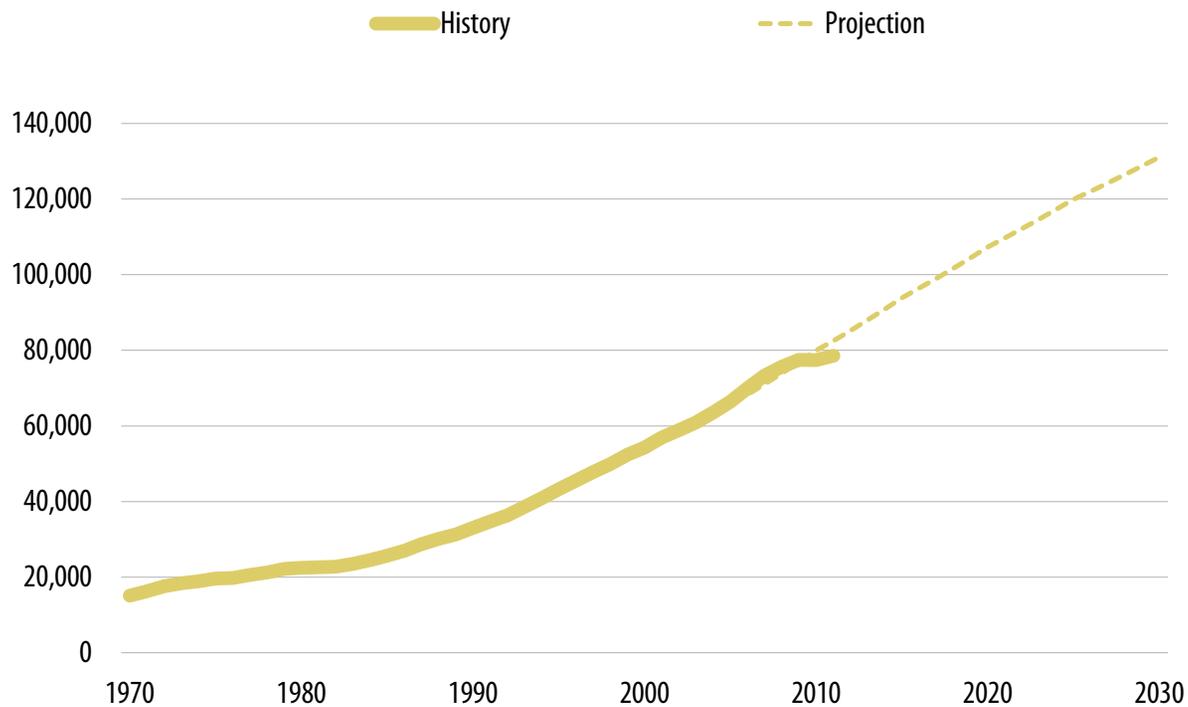
Source: U.S. Census Bureau.

DEMOGRAPHICS

The Missouri State Data Center's most recent projections indicate continued growth for the county over the next two decades. According to this scenario, Christian County would pass the 100,000 mark just before the next national census is taken in April 2020. The population would be somewhere near 130,000 by 2030 if these projections came to pass.

CHRISTIAN COUNTY'S POPULATION OUTLOOK

Latest projected growth scenario



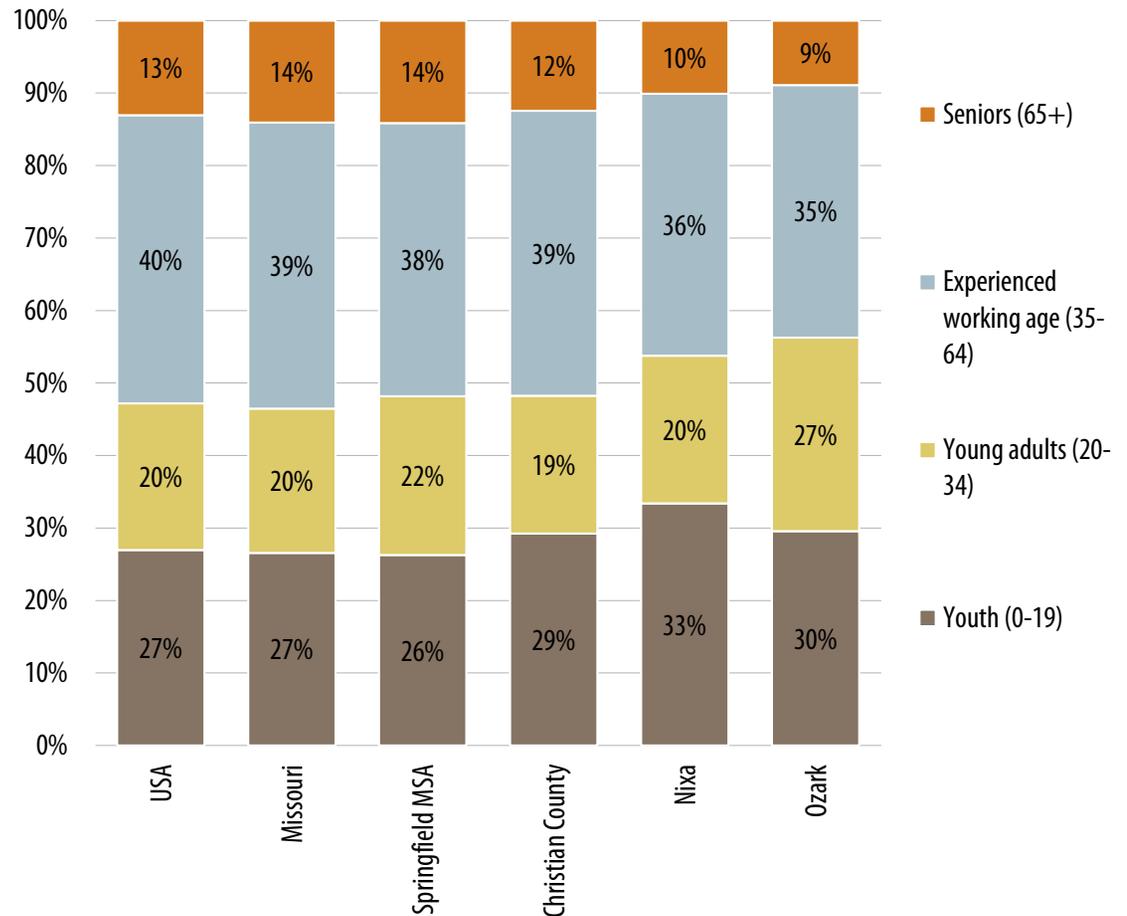
Source: U.S. Census Bureau; Moody's Analytics; Missouri State Data Center.

DEMOGRAPHICS

Comparing local age structure to the national average can be a helpful way to gauge the local demographic situation.

Christian County looks approximately similar to the US overall, but Nixa and Ozark have a larger share of residents under the age of 20 and a smaller share of residents aged 65 or older. Ozark also has a much larger share of residents between the ages of 20 and 34. The demographic trends indicate that Nixa and Ozark are attractive to families with children.

COMPARATIVE POPULATION DISTRIBUTION BY AGE, 2010*



*Note: Data for the US, state, MSA, and county are 2010 estimates; cities are averages of 2006-2010 data. Source: U.S. Census Bureau (American Community Survey); Missouri State Data Center.

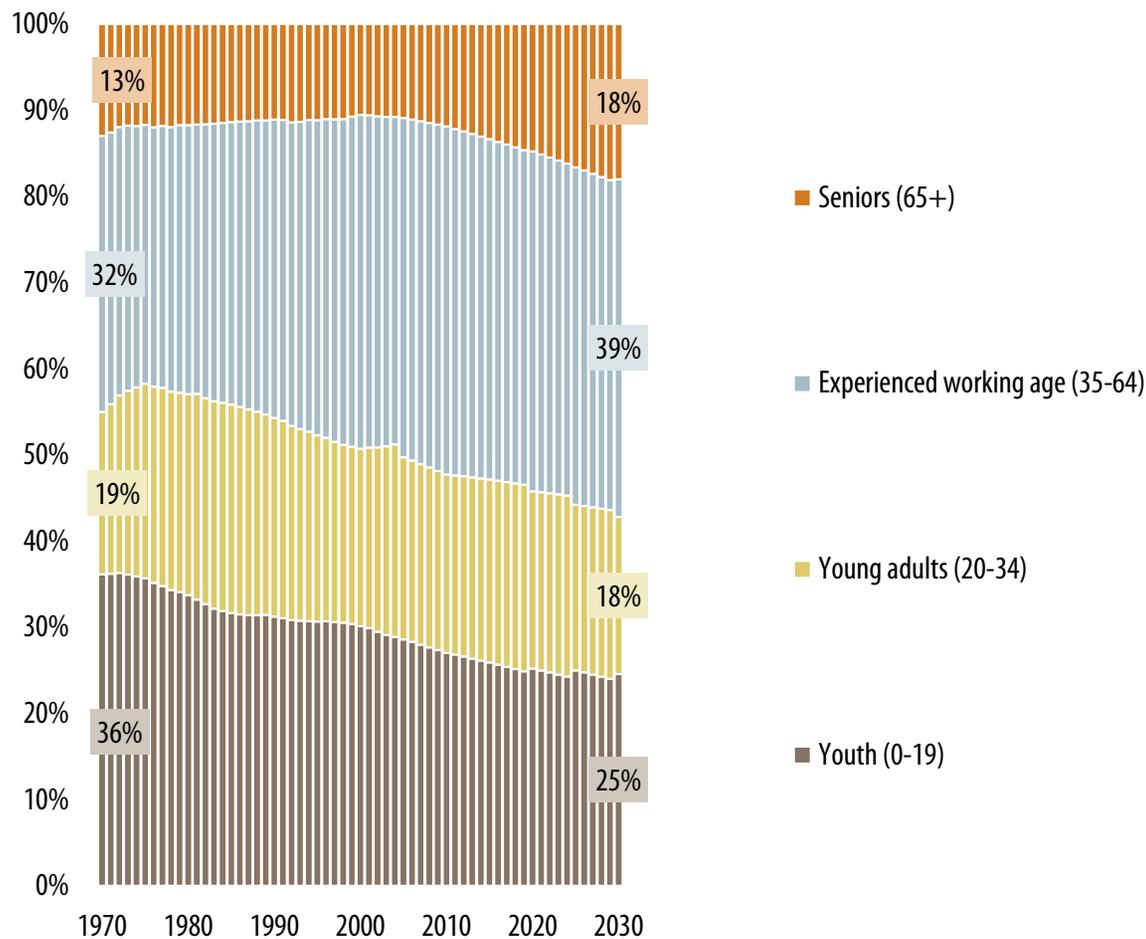
DEMOGRAPHICS

Like the US overall, the "baby boomer effect" has spent decades working its way through the Christian County demographic structure.

As the baby boomers (those born between 1946 and 1964) retire, they will increase the size of the senior cohort over the next 20 years. By 2030, the senior cohort is expected to represent 18% of the overall population.

Birth rates since 1964 have been lower, so the share of youth in the local population (36% in 1970) will fall to around 25% in the next 20 years.

CHRISTIAN COUNTY POPULATION DISTRIBUTION BY AGE



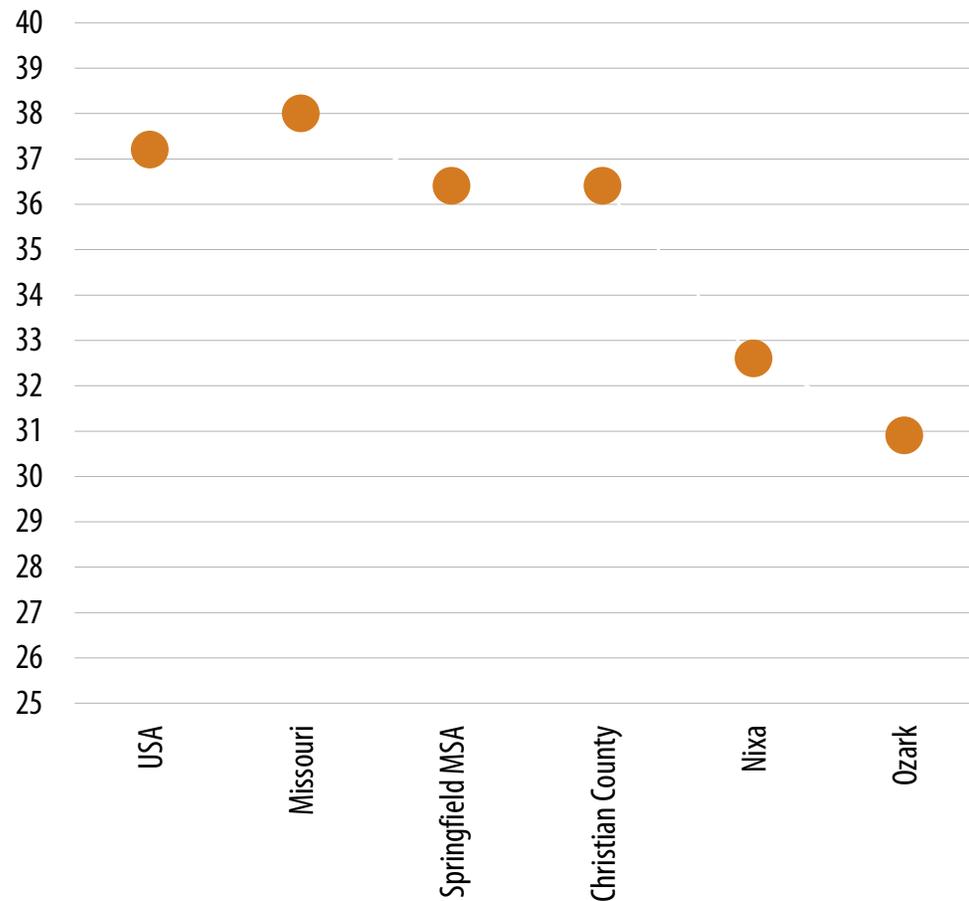
Source: U.S. Census Bureau; Moody's Analytics; Missouri State Data Center.

DEMOGRAPHICS

The youthful character of the population in Nixa and Ozark is obvious in this chart. The median age of Ozark is 30.9. Nixa is 32.6.

The median age in Missouri overall is 38.0, slightly higher than the national median of 37.2.

MEDIAN AGE OF THE POPULATION*



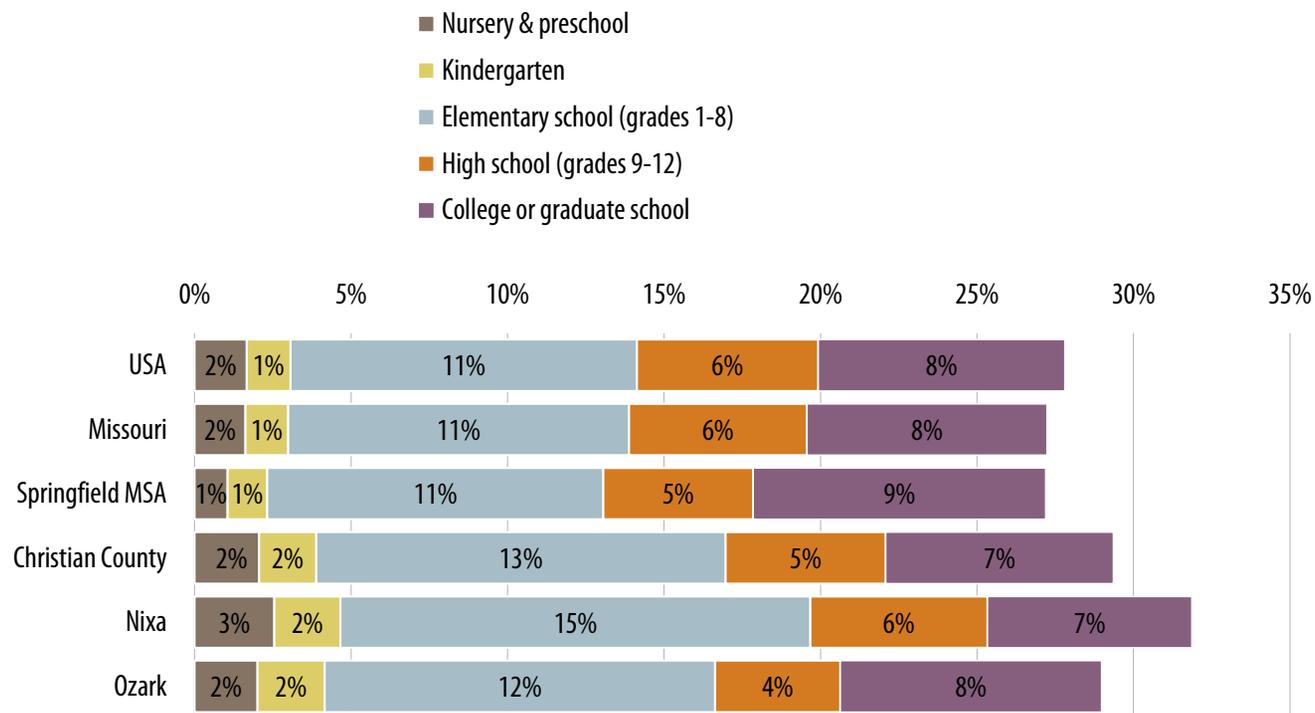
*Note: Data for the US, state, MSA, and county are 2010 estimates; cities are averages of 2006-2010 data.
Source: U.S. Census Bureau (American Community Survey); Missouri State Data Center.

DEMOGRAPHICS

Younger populations have higher enrollment statistics, and this is certainly the case in Nixa where 32% of residents age 3 or above are enrolled in some type of educational program. Both Ozark and Christian County have above-average total enrollment ratios as well.

Most of the uptick in enrollment among Christian County residents is visible up through the primary education levels. However, at the secondary and tertiary levels local enrollments are either on par or below national levels. Nixa, in particular, has a much higher percentage of its population enrolled in elementary school.

CURRENT ENROLLMENT STATUS OF THE POPULATION AGE 3 OR OLDER*



*Note: Data for the US, state, MSA, and county are 2010 estimates; cities are averages of 2006-2010 data.

Source: U.S. Census Bureau (American Community Survey); Missouri State Data Center.

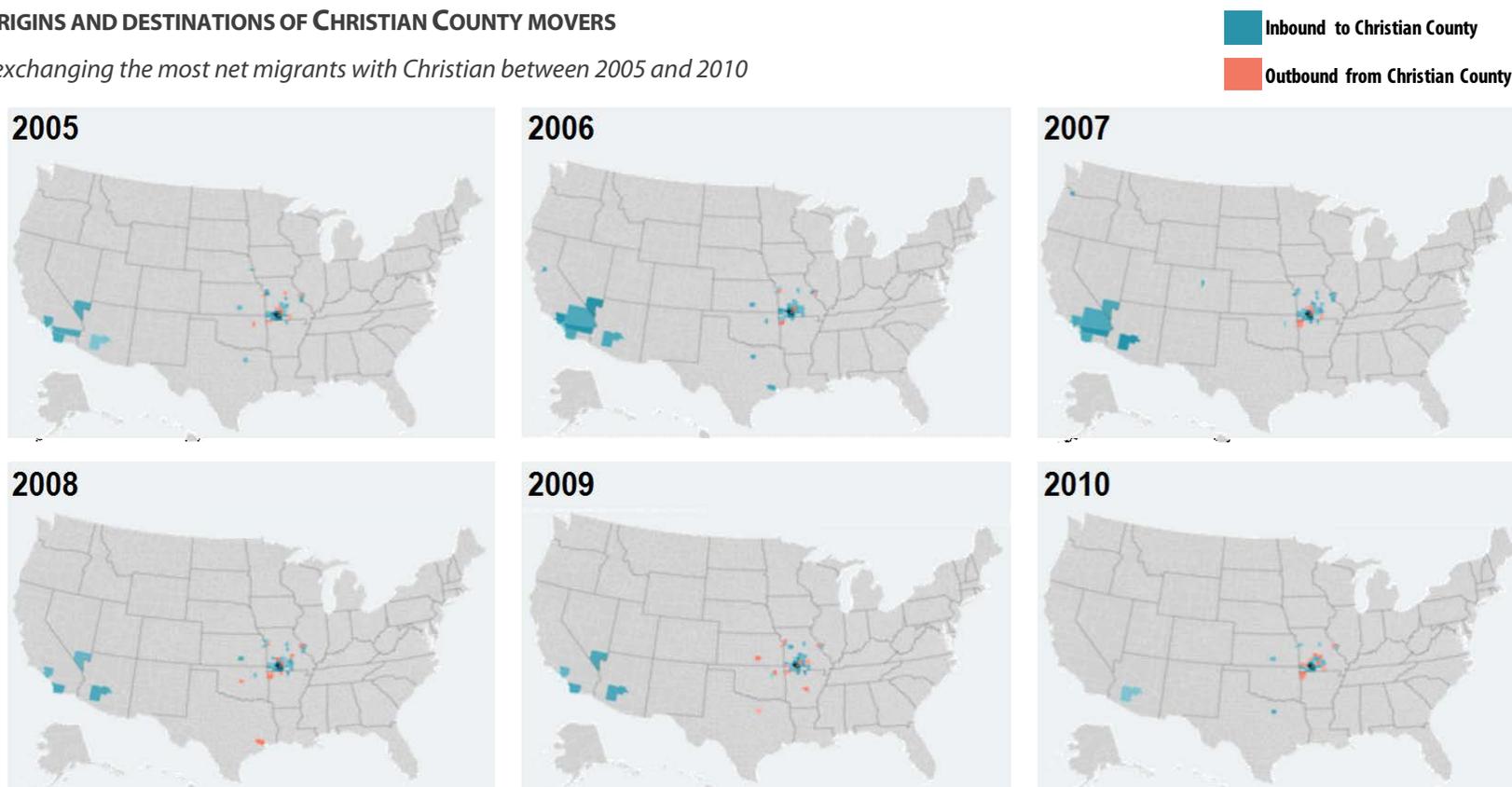
MIGRATION & MOBILITY

The US Internal Revenue Service tracks changes in the number and location of income tax exemptions. This administrative data (a bi-product of filing an annual tax return) can be used to show patterns of people moving into and out of a county over time.

For Christian County, two patterns are notable. First, the county gets sporadic net in-migration from urban areas in the Southwestern U.S., including Los Angeles, San Diego, Las Vegas, and most consistently over the years, Phoenix. This stream of in-migration peaked in the boom years of 2006-2007. And second, Christian County has shown a consistent pattern of out-migration to northwestern Arkansas

MAJOR ORIGINS AND DESTINATIONS OF CHRISTIAN COUNTY MOVERS

Counties exchanging the most net migrants with Christian between 2005 and 2010



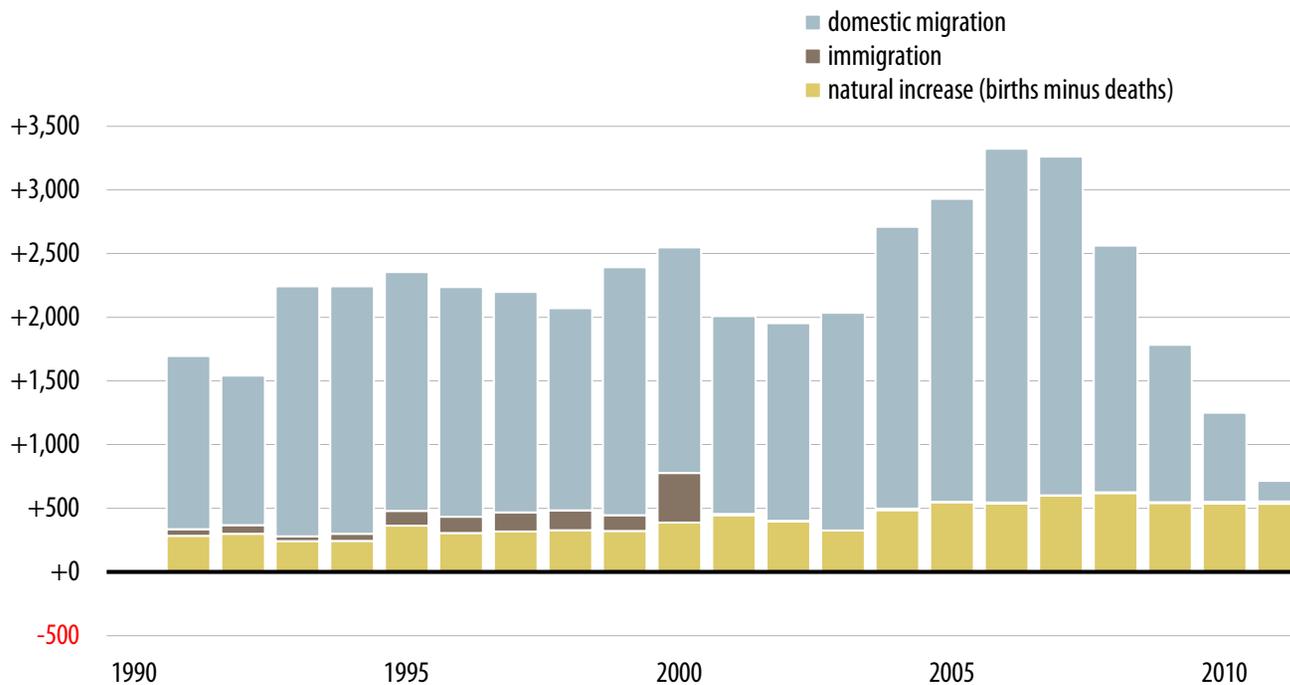
Source: US Internal Revenue Service, county-to-county migration flows; Forbes visualization tool.

MIGRATION & MOBILITY

Immigration levels peaked in the 1990s and have mostly dissipated over the past decade. The natural increase of the population (i.e., the net of county birth certificates and death certificates) has grown, albeit very slowly over time.

A larger factor affecting population growth for the County is net domestic in-migration. Christian County's totals in this area peaked in 2006 and 2007 and have since deflated quickly. In 2011, domestic in-migration accounted for a smaller share of population growth than natural increase for the first time in 20 years.

COMPONENTS OF GROWTH IN CHRISTIAN COUNTY



Source: U.S. Bureau of the Census; Moody's Analytics.

MIGRATION & MOBILITY

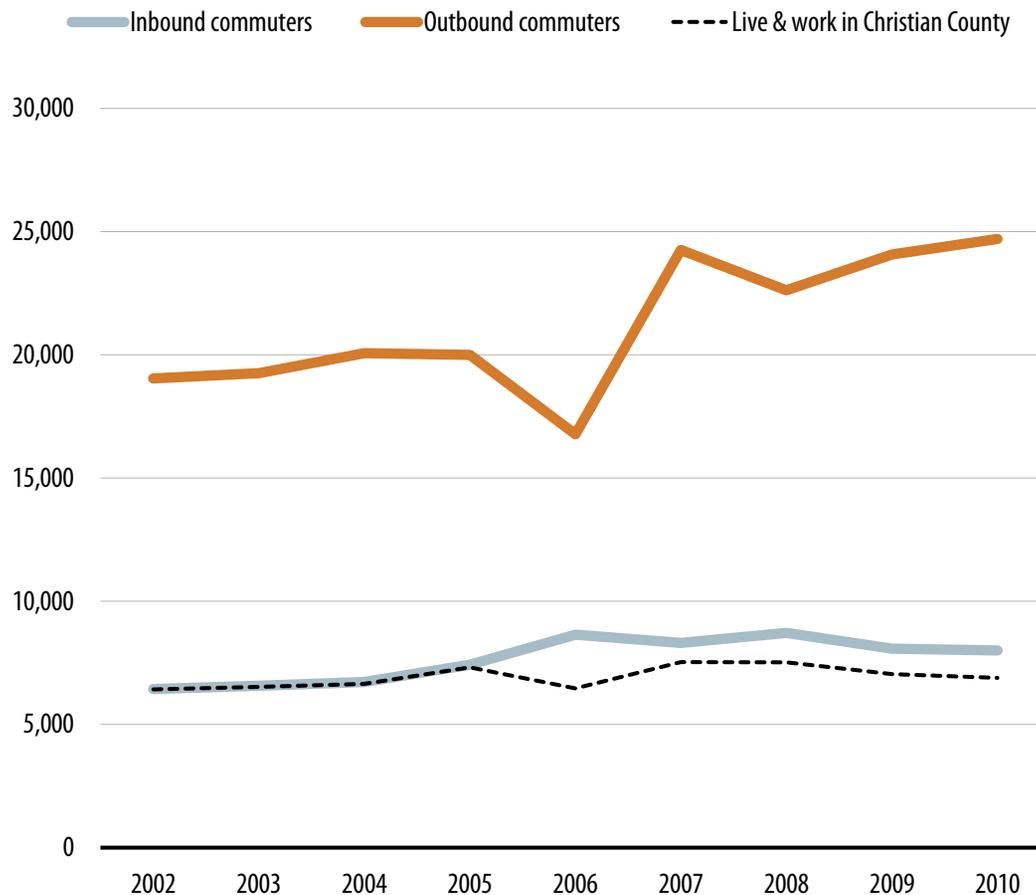
As of 2010, there were approximately 6,900 people who lived and worked in Christian County. This number has held relatively steady for several years.

Add to this another 24,700 employed residents in Christian County who work in a different county. Just a few years ago, there were under 20,000 Christian residents who fit this description.

About 8,000 people currently live in a different county and work in Christian County. Since 2002, the number of inbound commuters has increased by about 1,500.

The total effect is the net outflow of more than 16,700 workers daily.

DAILY INBOUND AND OUTBOUND COMMUTER TRAFFIC FOR CHRISTIAN COUNTY

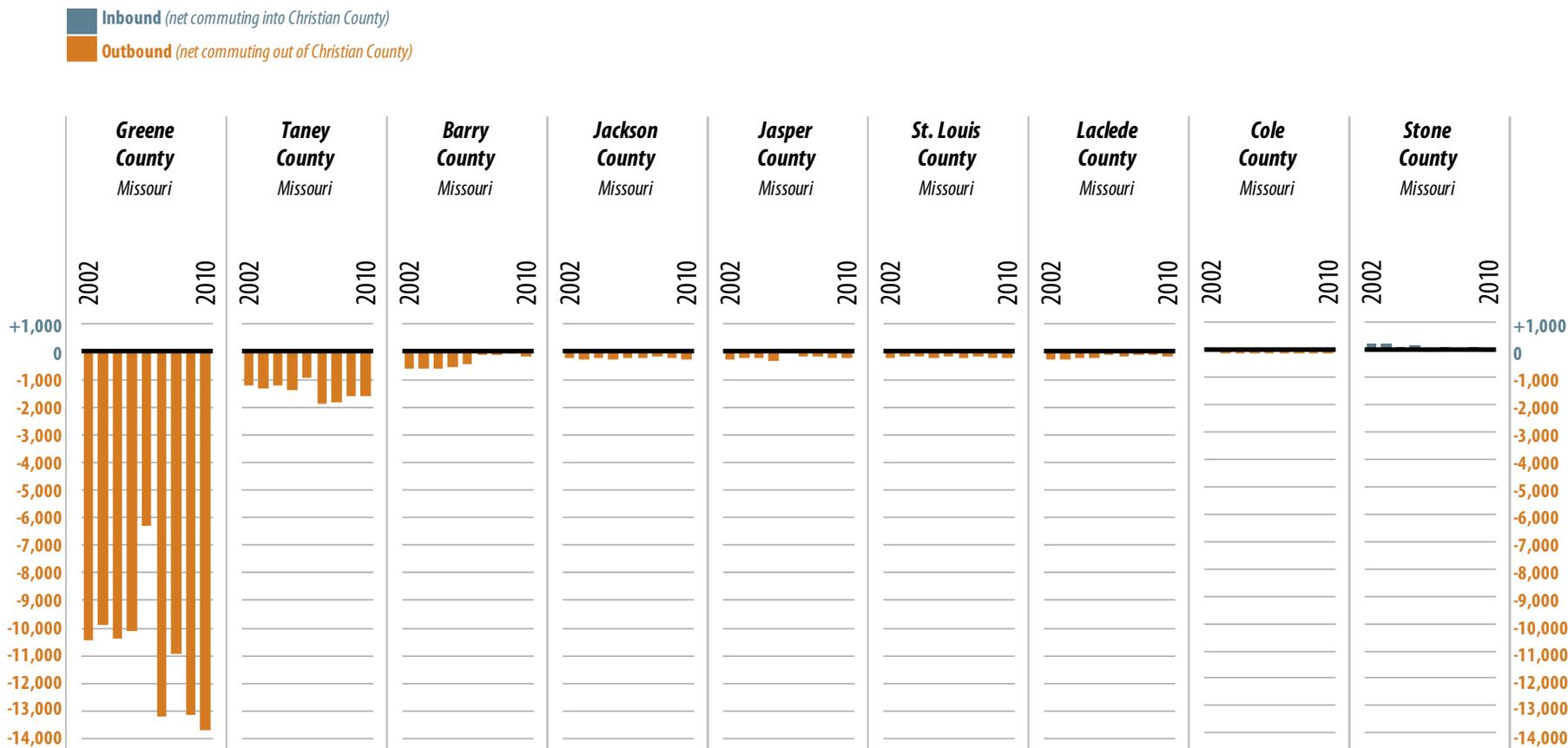


Source: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2002-2010.

MIGRATION & MOBILITY

The vast bulk of Christian County's net outbound commuter traffic heads to Greene County. A moderate share of net outbound traffic also heads to Taney County. Stone County is the only county that exports more labor to Christian County than it imports.

MAJOR COMMUTING PATTERNS BETWEEN CHRISTIAN COUNTY AND OTHER COUNTIES



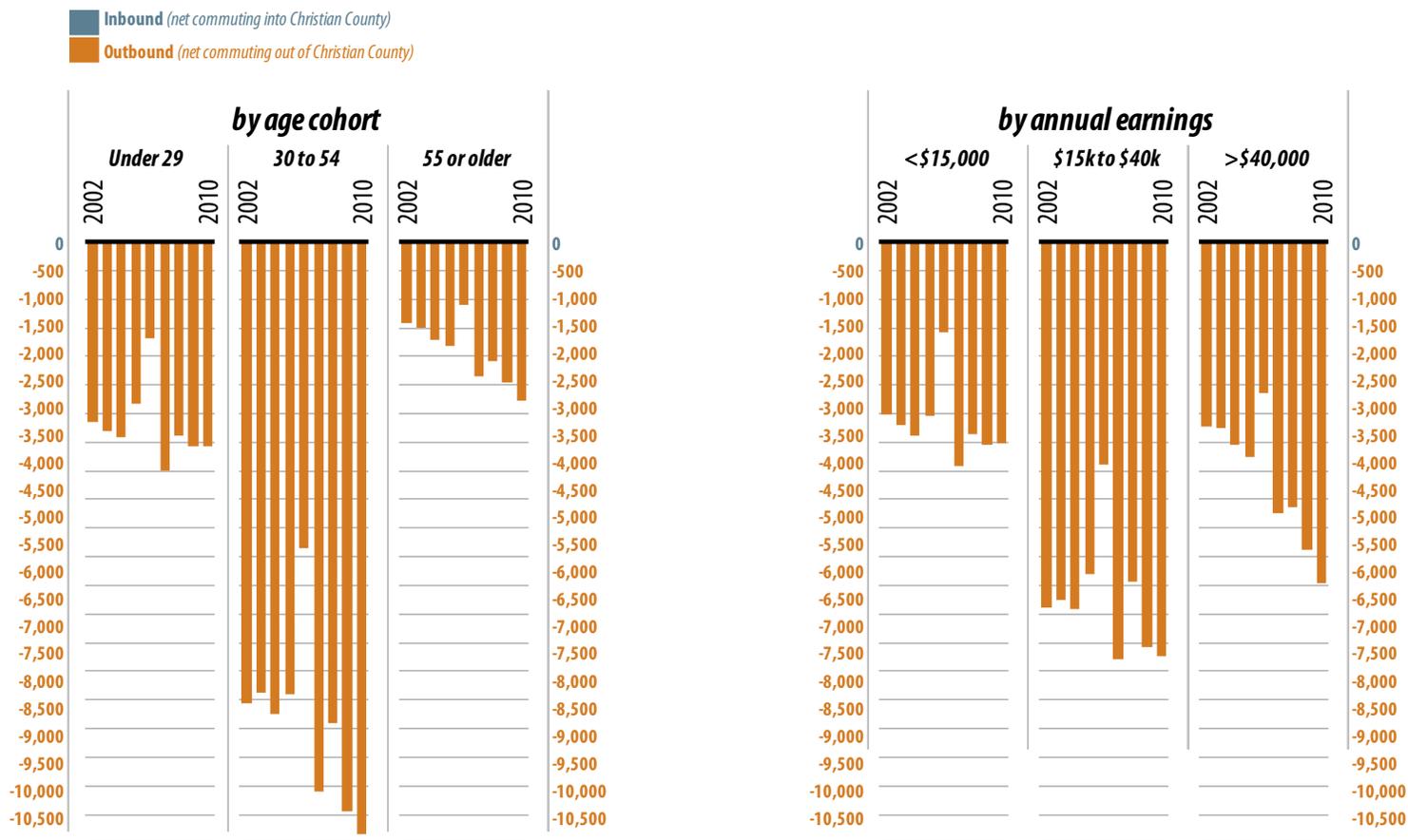
Source: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2002-2010.

MIGRATION & MOBILITY

Net outbound traffic from Christian County cuts across all age groups and earnings levels. The largest cohort of outbound commuters are between the ages of 30 and 54 and earn \$15,000 to \$40,000 annually.

CHRISTIAN COUNTY'S COMMUTING PATTERNS BY SOCIODEMOGRAPHIC CHARACTERISTICS

Variances by age and income

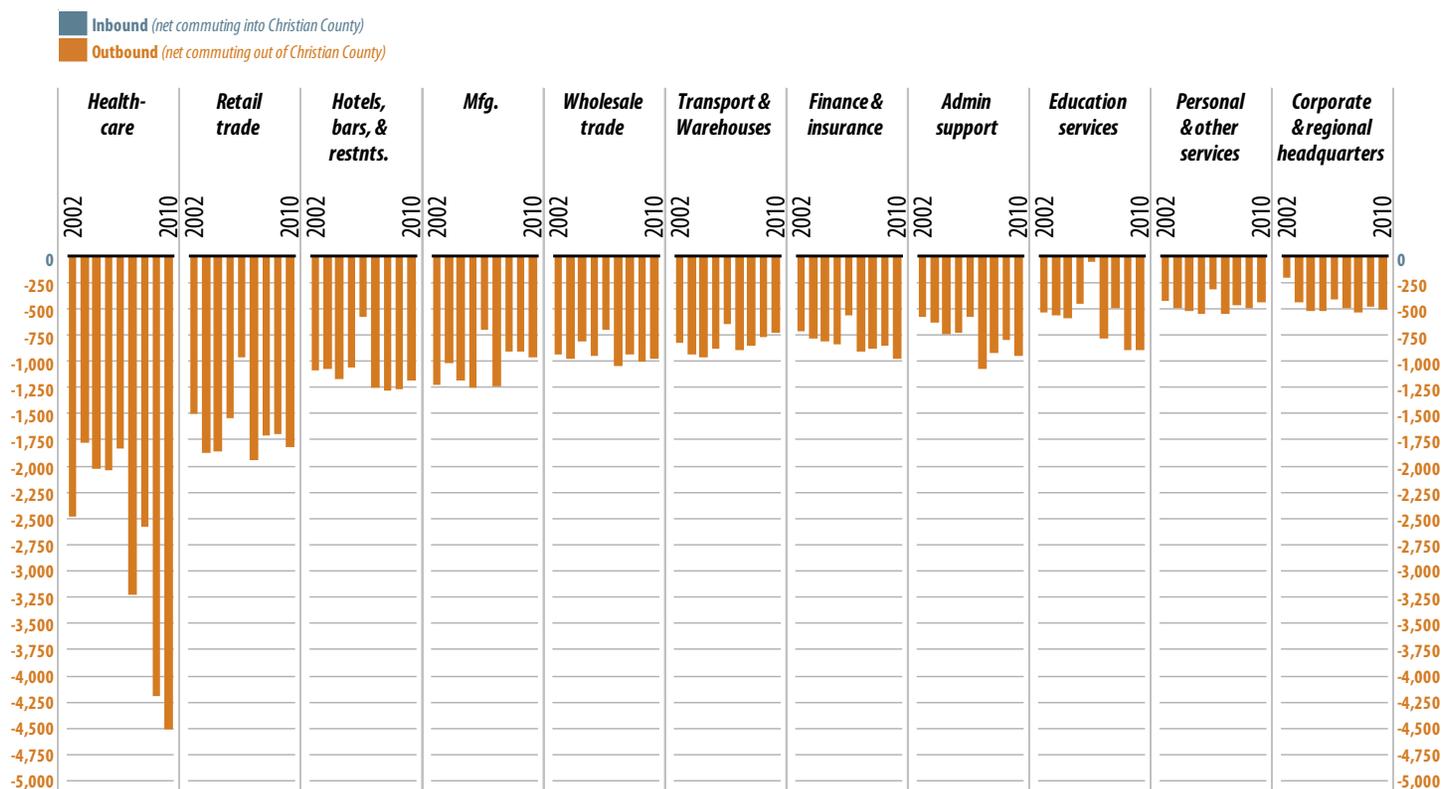


Source: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2002-2010.

MIGRATION & MOBILITY

Among industry sectors, healthcare pulls the largest number of Christian County residents across the county line to go to work. The outbound flow in this sector has grown faster than in any other industry since 2002. Christian County residents also find work outside the county in hospitality-oriented industries like hotels, restaurants, and retail stores. Industrial activities like manufacturing, wholesale trade, and transportation/warehousing draw substantial numbers of residents away from the county for work as well.

NET DAILY COMMUTER FLOW TO/FROM CHRISTIAN COUNTY IN SELECTED ECONOMIC SECTORS



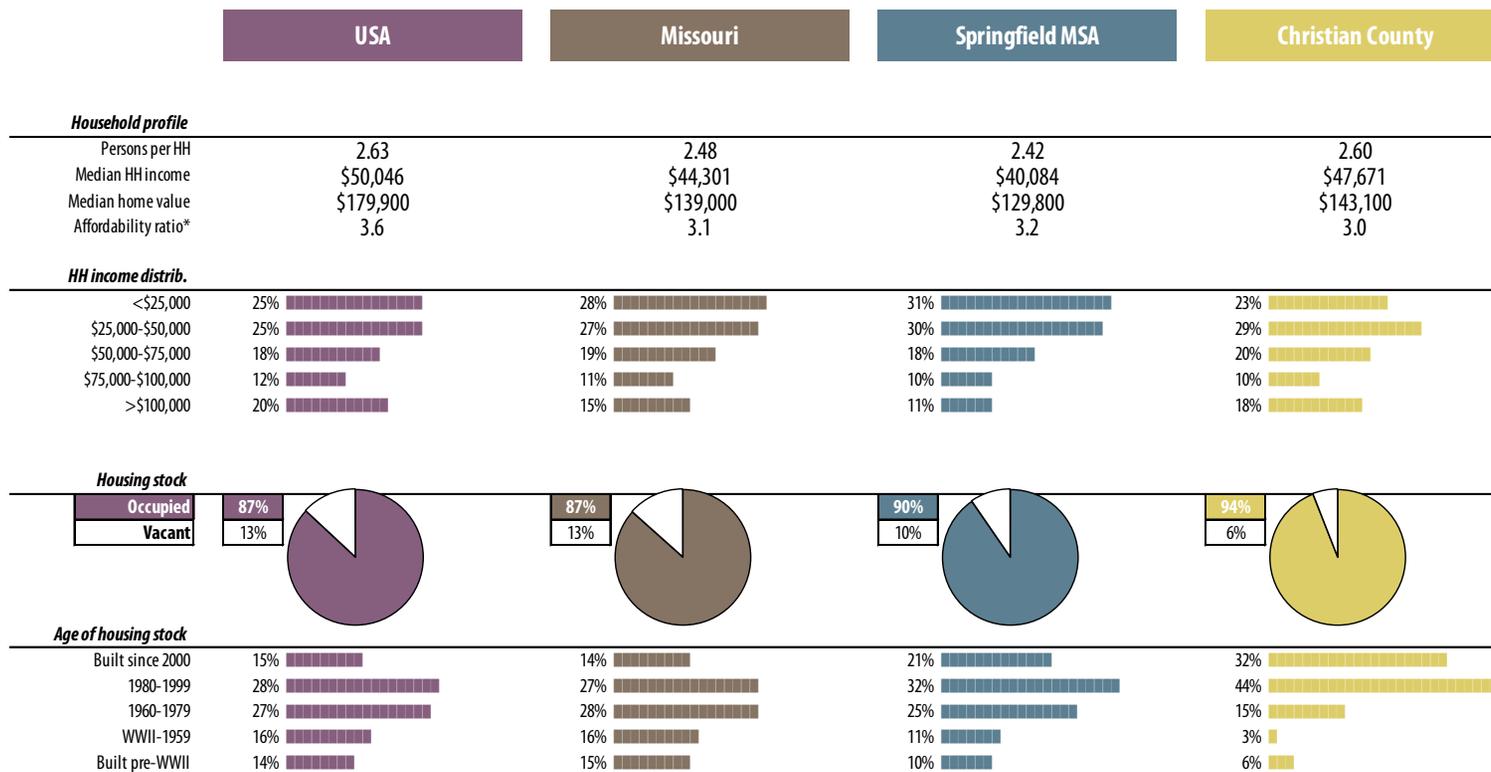
Source: U.S. Bureau of the Census, Local Employment Dynamics (LED) database, 2002-2010.

INCOME & HOUSING

Christian County's median income level is below the national average, but high relative to the MSA and state. The county's housing stock is quite new, with 3 out of every 4 units constructed since 1980. The vacancy rate is 6%, less than half the state and national rate of 13%.

HOUSEHOLD COMPARISON (BROAD)

Household size, income, and housing stock



Note: Data for the US, state, MSA, and county are 2010 estimates.

*Note: The affordability ratio is the median home value divided by the median household income. The "ratio" equates the home prices to raw earning potential (expressed in years of gross income needed to pay for the home). The lower the number, the more affordable the housing.

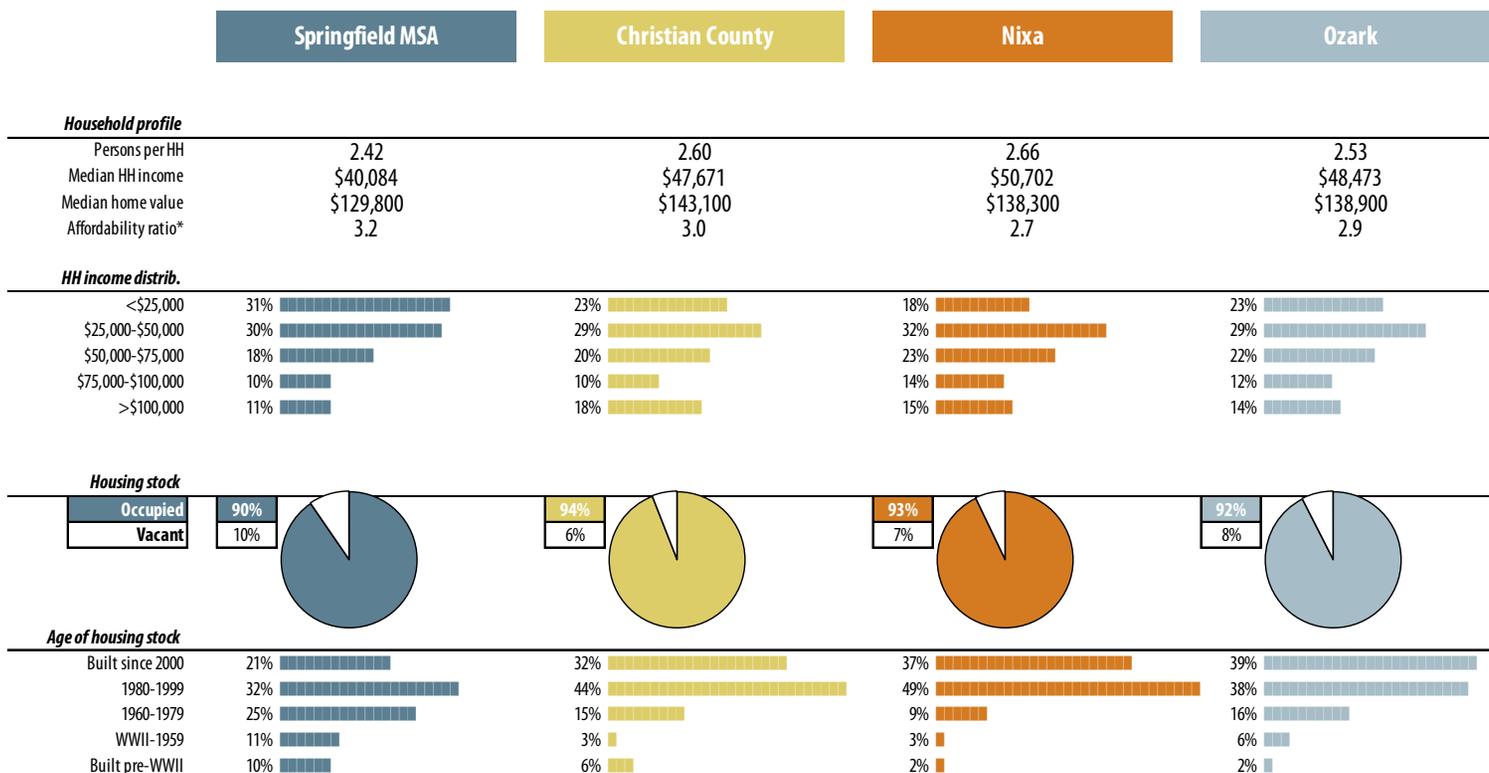
Source: U.S. Census Bureau (American Community Survey); Missouri State Data Center.

INCOME & HOUSING

Both Nixa and Ozark have higher median income levels than the county as a whole, but residents report median home values that are slightly below the county level. This results in very favorable housing affordability ratios in both cities.

HOUSEHOLD COMPARISON (LOCAL)

Household size, income, and housing stock



Note: Data for the MSA and county are 2010 estimates; cities are averages of 2006-2010 data.

*Note: The affordability ratio is the median home value divided by the median household income. The "ratio" equates the home prices to raw earning potential (expressed in years of gross income needed to pay for the home). The lower the number, the more affordable the housing.

Source: U.S. Census Bureau (American Community Survey); Missouri State Data Center.

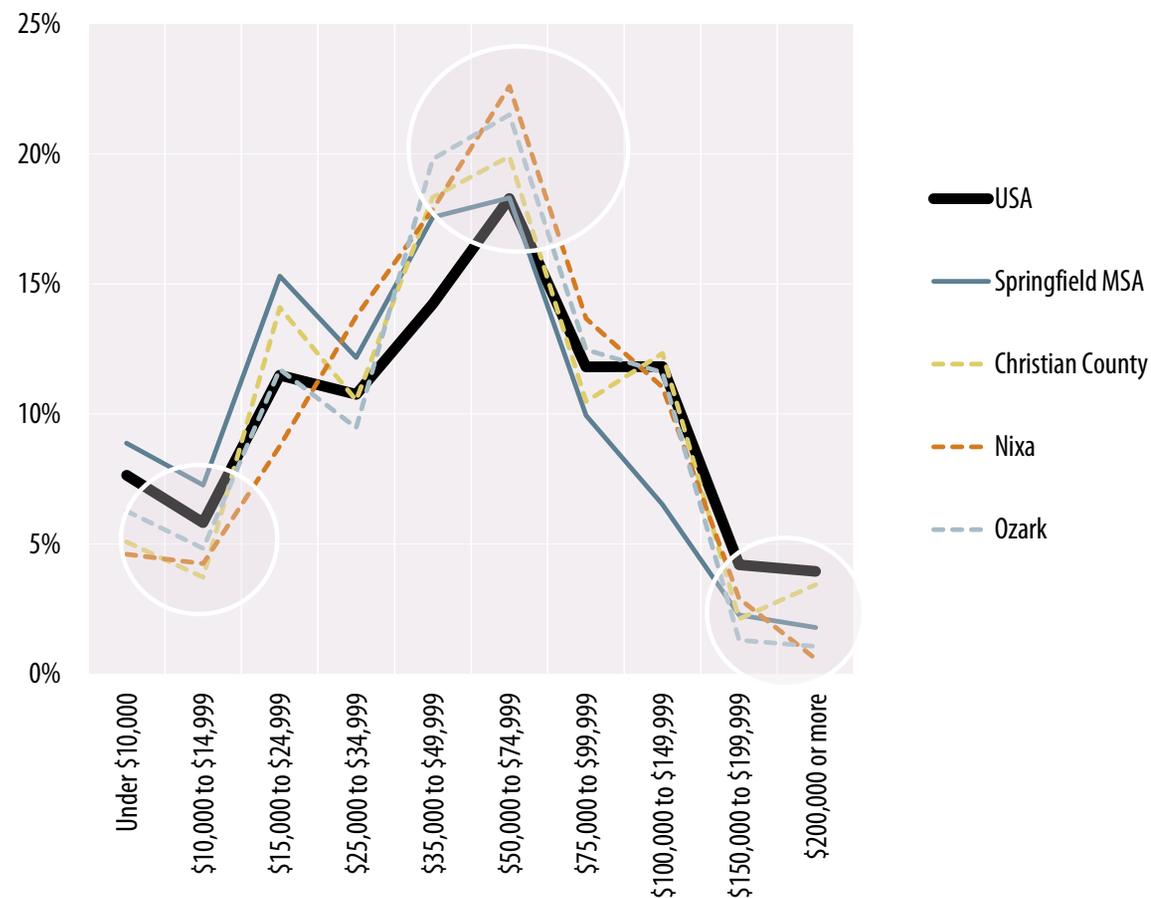
INCOME & HOUSING

When compared to the US income distribution curve, Christian County appears solidly middle class.

Christian County, as well as the cities of Nixa and Ozark, has fewer lower income residents than the national average. They also have fewer high-income residents. The result is a local "bulge" in the middle income categories between \$35,000 and \$75,000.

DISTRIBUTION OF HOUSEHOLD INCOME

Share of total households by income level

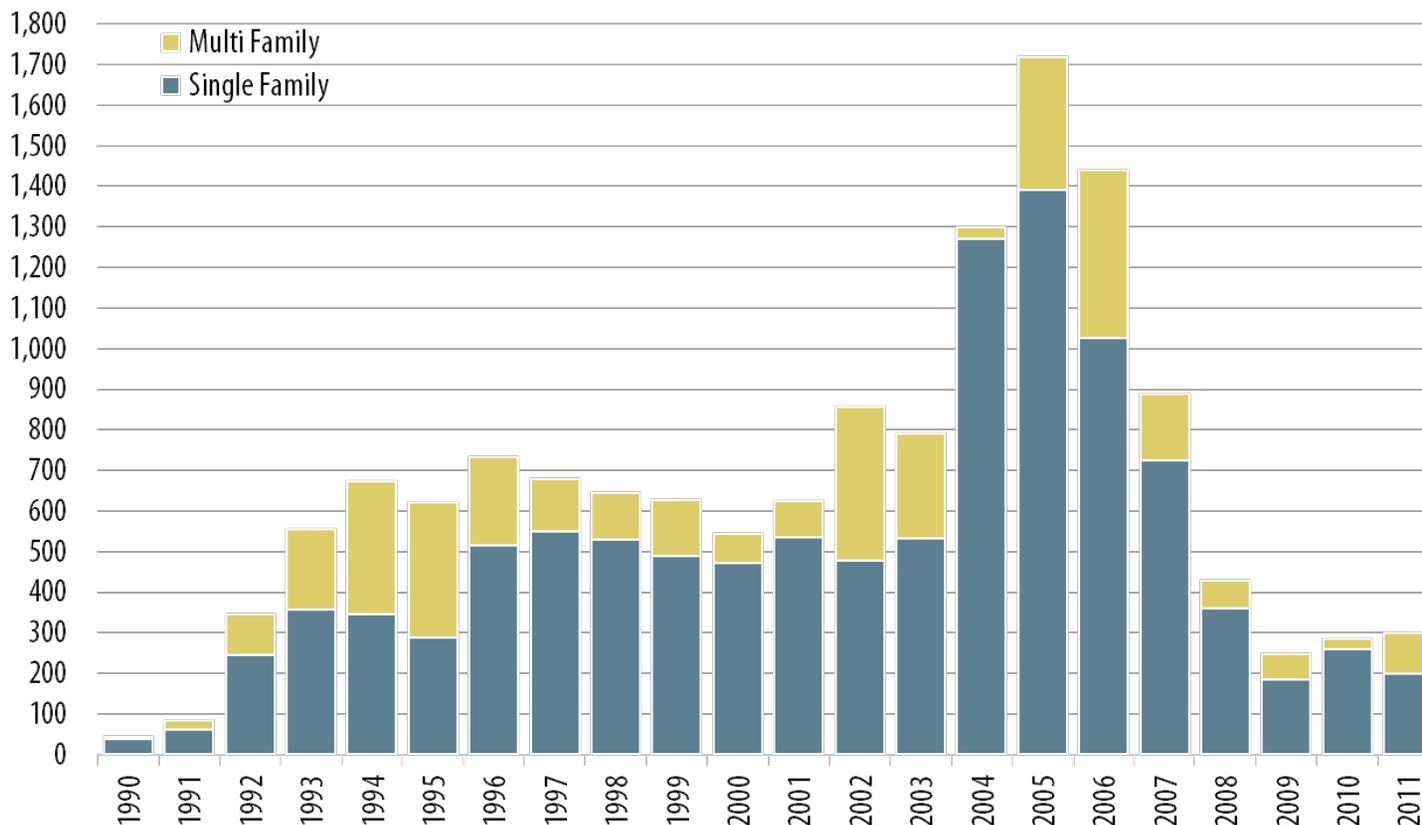


Source: U.S. Census Bureau (American Community Survey, 2006-2010 average).

INCOME & HOUSING

At the mid-point of the last decade, Christian County was issuing single family housing permits at the fastest pace in its history. Multifamily permitting was also strong in the mid-2000s, matching aggressive levels from the mid-1990s. Since 2008, permitting for both single and multifamily housing units has dropped back to the pace of the early 1990s.

NEW HOUSING UNITS PERMITTED IN CHRISTIAN COUNTY



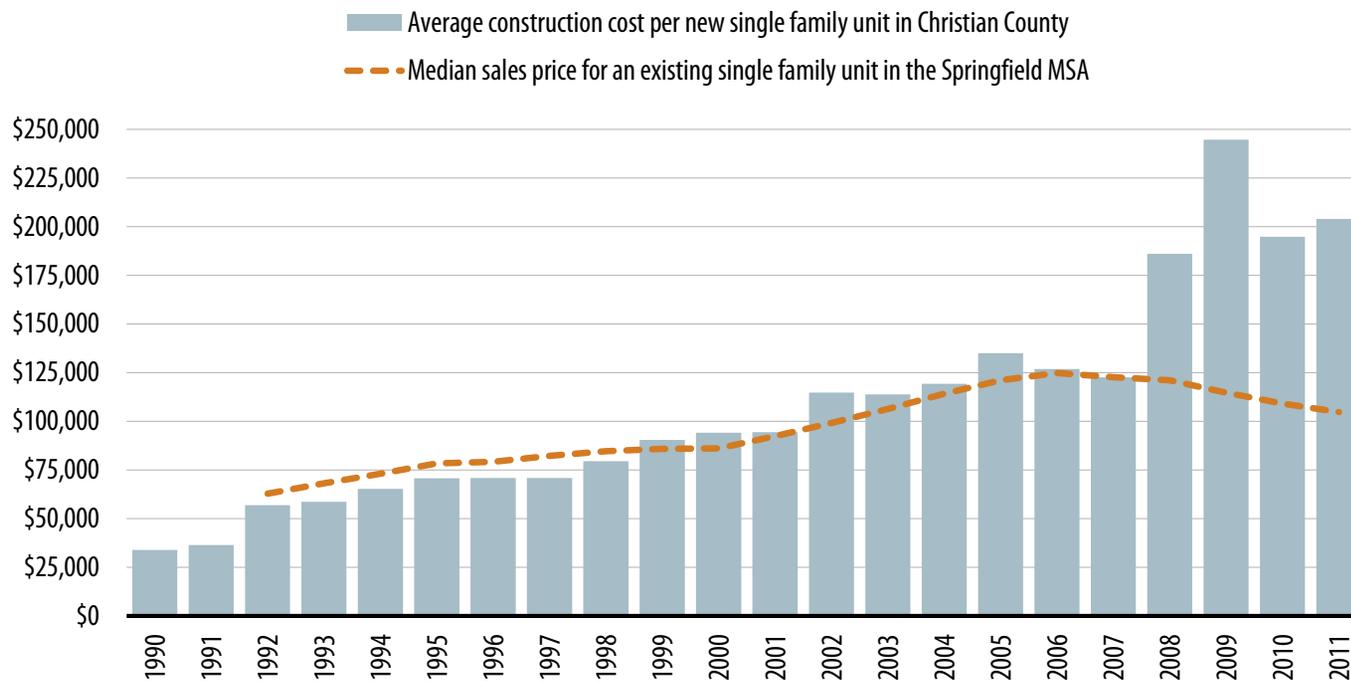
Source: US Census Bureau.

INCOME & HOUSING

The average construction cost for a single family housing unit in Christian County used to be roughly on par with the median sales price of an existing single-family home in the MSA overall. Since 2008, the price for new and existing homes have diverged. Median sales prices have fallen from peak levels in the MSA but construction values have soared in Christian County. The type of housing currently being permitted in the county is well above what might be considered "replacement value" stock in the MSA at large.

SINGLE FAMILY HOME MARKET

Average construction costs in Christian County vs. median sales prices in the Springfield MSA



Note: The median sales price for 2011 is still preliminary; median sales prices for 2002 and 2003 were unavailable and have been plugged in as linear values between 2001 and 2004.

Source: US Census Bureau; National Association of Realtors.

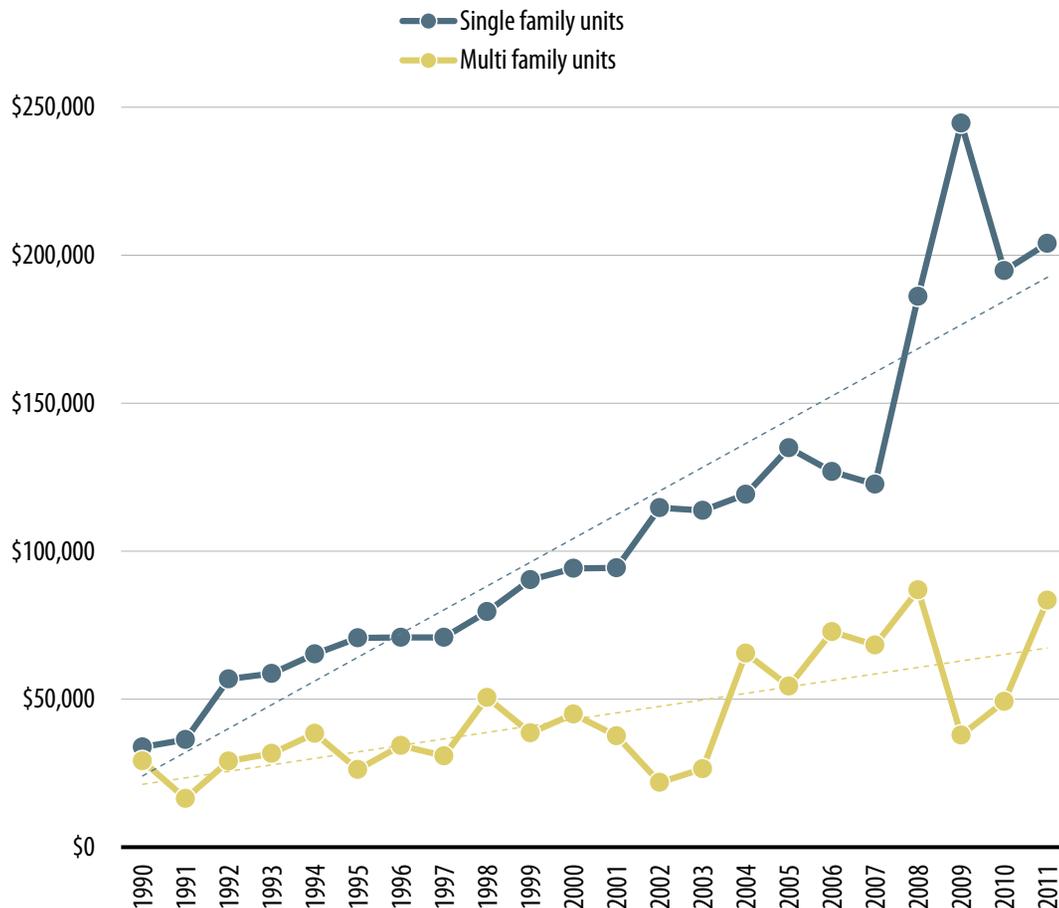
INCOME & HOUSING

The trend line for average per-unit multifamily construction costs has risen moderately over time (and these figures are unadjusted for inflation, which might show the multifamily construction costs looking even steadier).

Compare this to single family construction costs in the county. There is a divergence that was gradual for many years, but after 2007, the gap between the two grew much wider. As of 2011, the average single family unit permitted in Christian County cost about \$204,000. The average multi family unit was \$83,000, representing a gap of more than \$120,000. Back in 1990, that same gap was less than \$5,000.

SINGLE FAMILY VS. MULTI FAMILY CONSTRUCTION COSTS

Average construction costs in Christian County



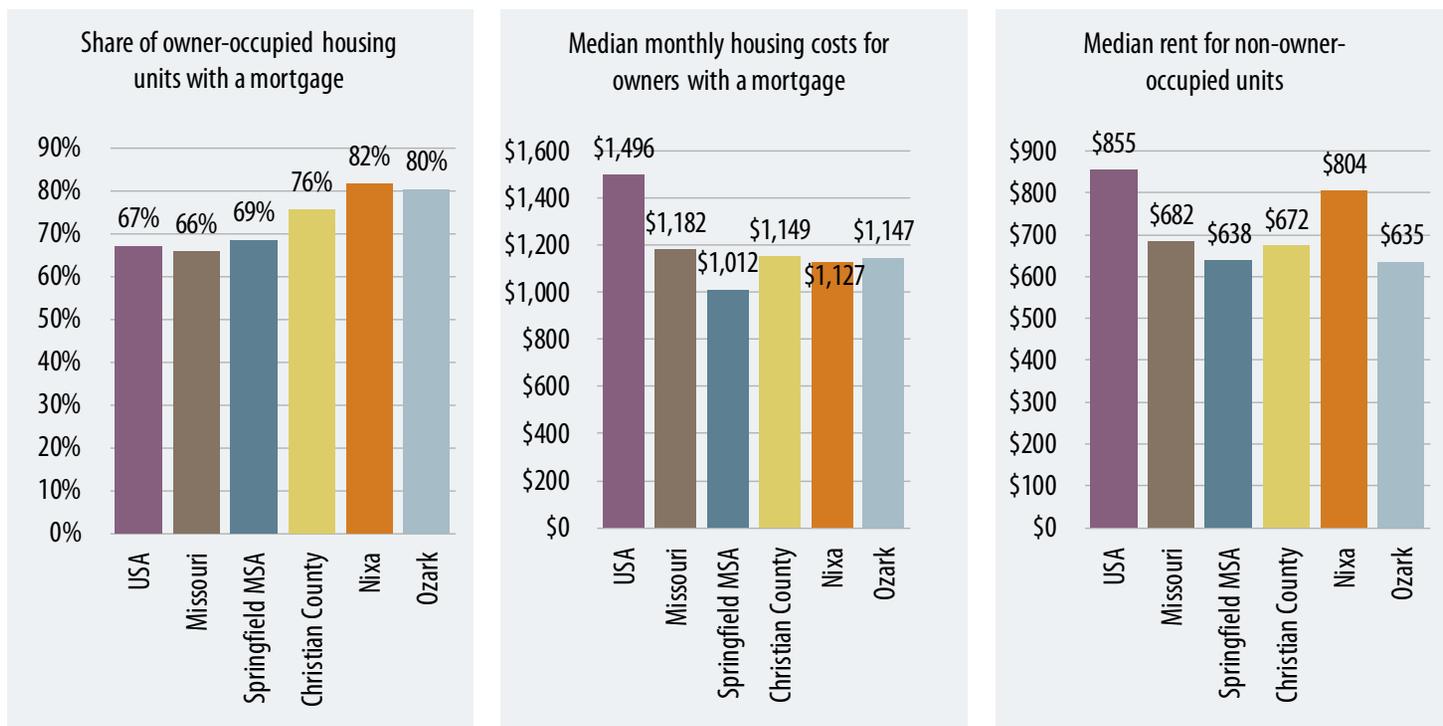
Source: US Census Bureau.

INCOME & HOUSING

In areas like Christian County with newer housing stock, people have been in their homes for shorter periods of time. As a result, these homes are more likely to be mortgaged. Nationwide (and in Missouri overall) about two-thirds of homeowners carry a mortgage. This rate is understandably higher in Christian County.

Christian County's upside is a lower cost of living. The typical mortgage holder in the county spends at least \$300 less than the national average each month on housing costs. Local renters also pay less than the national average, especially in Ozark.

COMPARATIVE OVERVIEW OF HOUSING COSTS



*Note: Data for the US, state, MSA, and county are 2010 estimates; cities are averages of 2006-2010 data.
 Source: U.S. Census Bureau (American Community Survey); Missouri State Data Center.

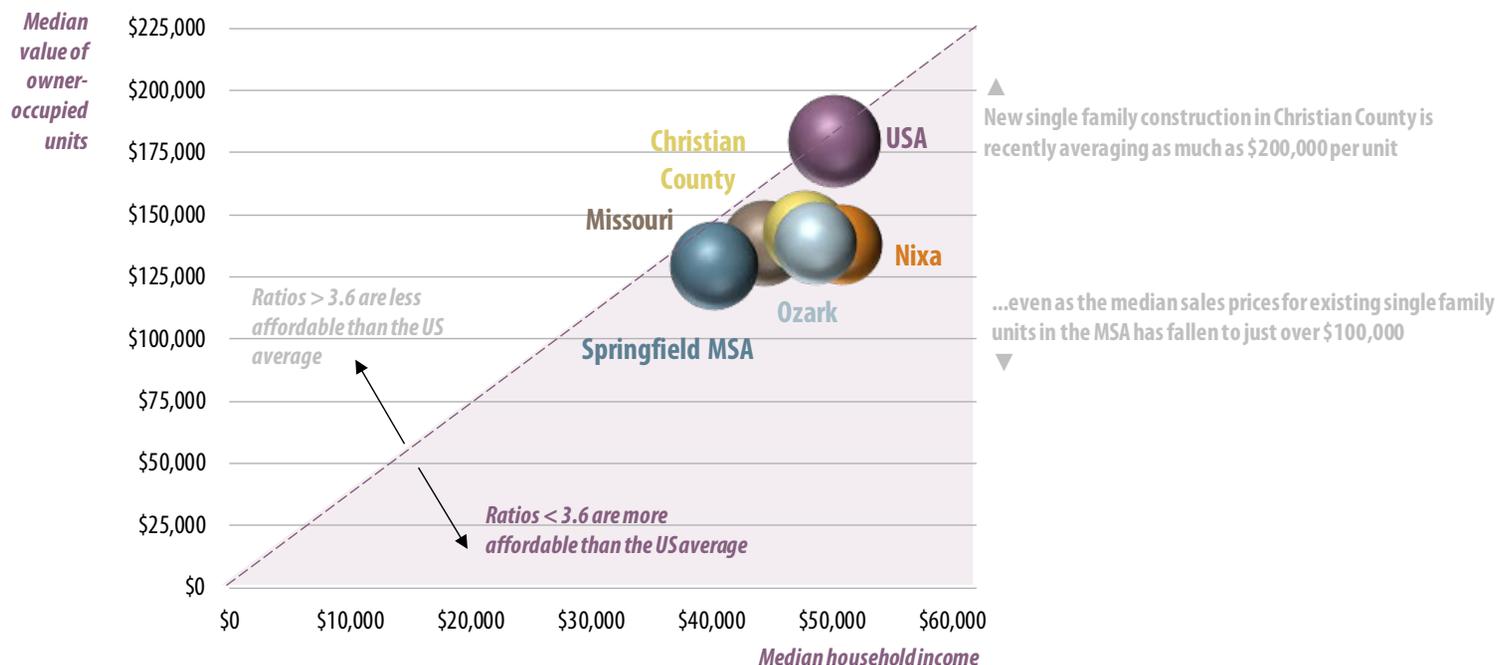
INCOME & HOUSING

The easy rule-of-thumb for measuring housing affordability is the ratio of median home price to median household income. This ratio crudely shows the number of years a typical household would need to pay for a median-priced housing unit if, in theory, 100% of income were applied to the principal until it was paid off. The lower the ratio, the quicker the house can be fully owned outright, thus implying greater affordability.

Christian County's affordability index (3.0) is well below the US average (3.6). Ozark's (2.9) and Nixa's (2.7) are even more favorable. The recent divergence between median resale values and housing construction costs raises some questions about the overall direction of the local market.

HOUSING AFFORDABILITY RATIOS

Housing in most of Missouri is more affordable than the nation overall, but there are nuances to the market



Note: Bubble sizes reflect relative affordability: Ozark (2.9), Nixa (2.7), Christian County (3.0), Springfield MSA (3.2), Missouri (3.1), US average (3.6).
 Source: U.S. Census Bureau (American Community Survey, 2006-2010 average).

INCOME & HOUSING

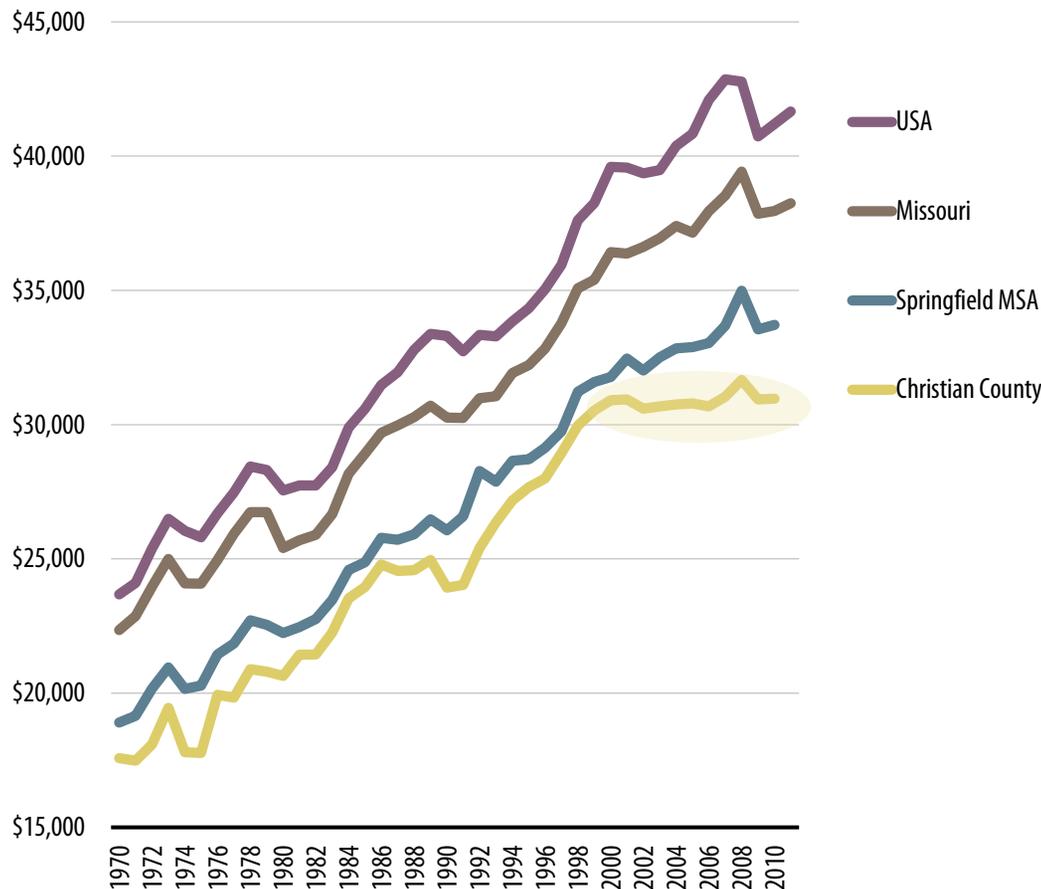
Inflation-adjusted per capita income (this is a per-person average, so it differs from median household income which was discussed earlier) has always been lower in Missouri, in Springfield, and in Christian County than in the US overall.

In general, the trend lines for all of these geographic areas moved in the same direction and at about the same pace up until roughly 2000. Since then, Springfield and especially Christian County have slipped below the national and state pace.

When adjusted for inflation, per-capita income in Christian County has shown virtually no gain in more than a decade.

INFLATION-ADJUSTED PER CAPITA PERSONAL INCOME

Relatively flat per capita income levels in Christian County over the past decade



Source: US Bureau of Economic Analysis.

ECONOMY

Major employers are split fairly evenly between the for profit and not-for-profit sectors in the Springfield MSA. Of the 26 largest employers reported by the Chamber, 14 are in the not-for-profit sector and 12 are in the for-profit sector. A closer look at employment levels, however, shows a more nuanced picture of this distribution. The 26 largest employers provide about 51,000 jobs in the MSA according the Chamber's estimates, but barely 15,000 of these jobs are with the 12 for-profit companies listed here.

MAJOR EMPLOYERS IN THE SPRINGFIELD MSA

Name	Existing Jobs
Mercy Health Springfield Community	9,036
Cox Health Systems	7,560
United States Government	5,500
Wal-Mart Stores	4,000
Springfield Public Schools	2,911
Bass Pro Shops / Tracker Marine	2,306
State of Missouri	2,149
Missouri State University	1,673
O'Reilly Auto Parts	1,600
Citizens Memorial Healthcare	1,526
City of Springfield	1,250
Chase Card Services	1,071
Kraft Foods	1,000
SRC Holdings	996
City Utilities of Springfield	900
Expedia, Inc.	850
General Council of the Assemblies of God	850
American National Property & Casualty	730
Ozark R-VI School District	700
Prime	700
Associated Wholesale Grocers	697
Greene County	660
Burrell Behavioral Health	626
Great Southern Bank	600
Burlington Northern Santa Fe Railroad	600
Nixa R-II School District	600

Source: Springfield Area Chamber of Commerce (Springfield MSA Demographic & Statistical Profile, 3rd Quarter, 2012).

ECONOMY

A list of the major employers in Christian County shows the region’s reliance on public sector employers. Among the private sector employers, however, there is a mix of companies from the retail, healthcare, financial, and manufacturing sectors.

MAJOR EMPLOYERS IN CHRISTIAN COUNTY

Top 10 employers in Nixa

Name of Business	# of Employees
Nixa School District	629
Wal-Mart	372
Diversified	125
City of Nixa	124
Price Cutter	96
Mercy	89
Christian County Healthcare	82
People’s Bank	76
Ozarks Community Hospital	65
Nixa Hardware	60
Bass Pro Shops	60

Source: Nixa Chamber of Commerce, Ozark Chamber of Commerce.

Top 10 employers in Ozark

Name of Business	# of Employees
Ozark School District	750
Wal-Mart	375
Lamberts	217
City of Ozark	185
Christian County	178
HealthMedX	150
Tracker Marine	101
Lowe's	72
Ozark Bank	52
OTC Richwood Valley Campus	40

ECONOMY

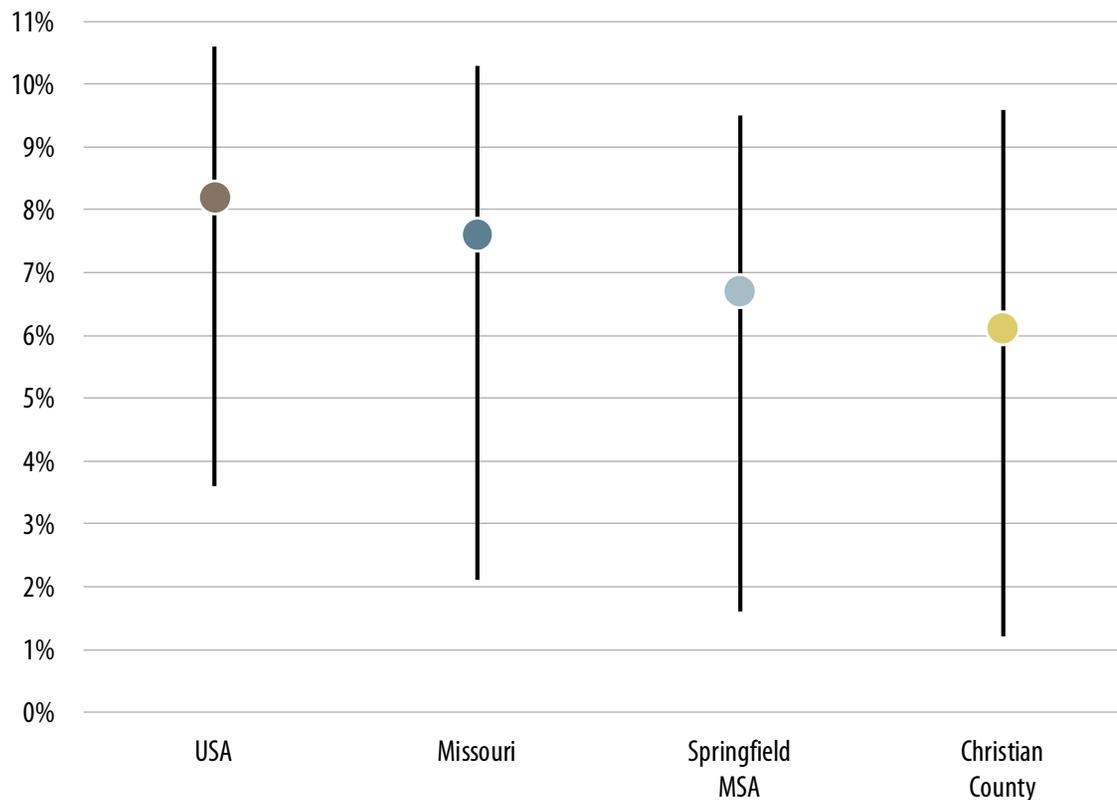
The unemployment rate in the Springfield MSA (and in Christian County) has performed better than the US and the statewide average.

In Christian County, the unemployment rate peaked at 9.6% in February of 2010. By the winter of 2012, the seasonal peak was back down to 7% and the summer low was just over 5%.

AVERAGE ANNUAL UNEMPLOYMENT RATE, 1990-2012 (%)

Latest 2012 unemployment rate relative to the historical range

— = unemployment rate range since January 1990
 ● = latest unemployment rate



Note: The Cities of Nixa and Ozark fall below the threshold population level for unemployment statistics from the state-federal LAUS program.
 Note: Because seasonal adjustment is not available for all jurisdictions, none of the rates shown (including comparables) are seasonally adjusted.
 Source: U.S. Bureau of Labor Statistics, CPS (US rate) and LAUS (state & county rates).

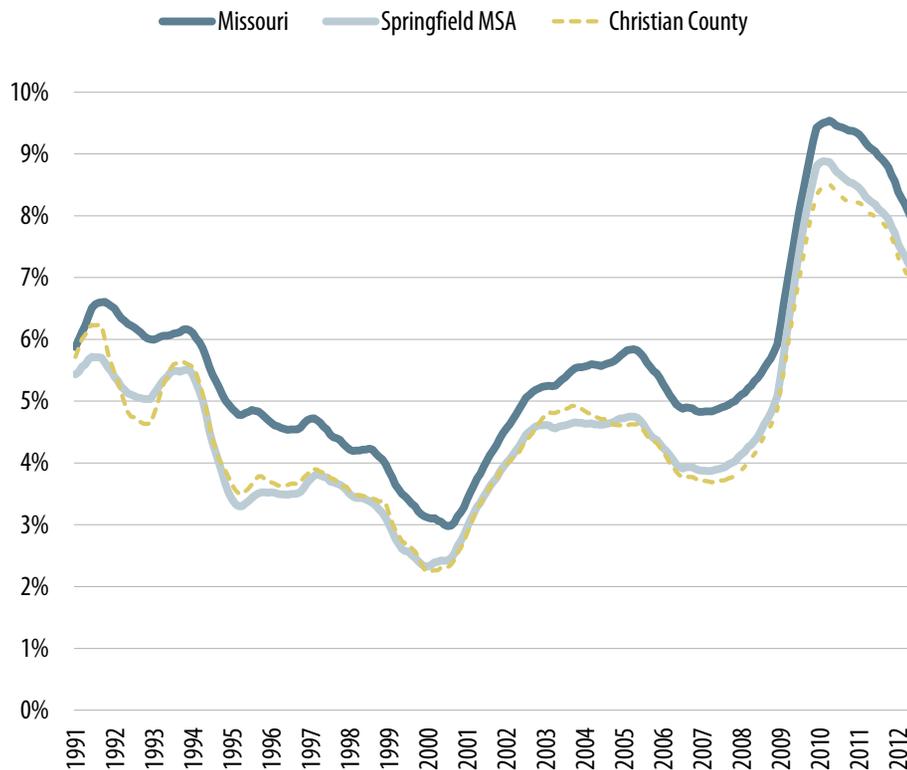
ECONOMY

Both the MSA and the county have a history of more stable employment than Missouri overall. Over the last 20 years, the gap between statewide and local unemployment was usually around a full percentage point.

Unemployment rates still remain elevated after the Great Recession, though they have been rapidly declining.

UNEMPLOYMENT RATES COMPARED

12-month moving average of the seasonally unadjusted jobless rates



Source: U.S. Bureau of Labor Statistics, LAUS (state, MSA, and county rates).

ECONOMY

In Christian County, the unemployment downturn ended by early 2010 and then stabilized during the rest of that year.

Through 2011 and 2012, the county's unemployment rolls have been falling steadily.

THE UNEMPLOYMENT ROLLS

Rolling unemployment trends among Christian County residents over the past 3 years

Monthly unemployment numbers are not seasonally adjusted, so they can only be compared to the same month in the previous year

Year	Month	Number Unemployed	Rolling 12-month Net Change	
2012	Jul	2,525	-481	
	Jun	2,221	-906	
	May	2,292	-667	
	Apr	2,330	-574	
	Mar	2,946	-393	
	Feb	3,156	-630	
	Jan	2,924	-928	
	2011	Dec	2,791	-546
		Nov	2,656	-580
		Oct	2,707	-386
		Sep	2,846	-281
		Aug	3,056	-132
Jul		3,006	-309	
Jun		3,127	-210	
May		2,959	-148	
Apr		2,904	-228	
Mar		3,339	-399	
Feb		3,786	-167	
Jan		3,852	-6	
2010	Dec	3,337	+52	
	Nov	3,236	+3	
	Oct	3,093	-206	
	Sep	3,127	-233	
	Aug	3,188	-279	
	Jul	3,315	-226	
	Jun	3,337	-264	
	May	3,107	-252	
	Apr	3,132	+23	
	Mar	3,738	+131	
	Feb	3,953	+274	
	Jan	3,858	+299	
2009	Dec	3,285	+1,063	
	Nov	3,233	+1,134	
	Oct	3,299	+1,337	
	Sep	3,360	+1,403	
	Aug	3,467	+1,469	

Note: LAUS survey data reflect household employment, i.e., the status of the county's employed residents. This is not the same as the county's job base.
 Source: U.S. Bureau of Labor Statistics, LAUS program.

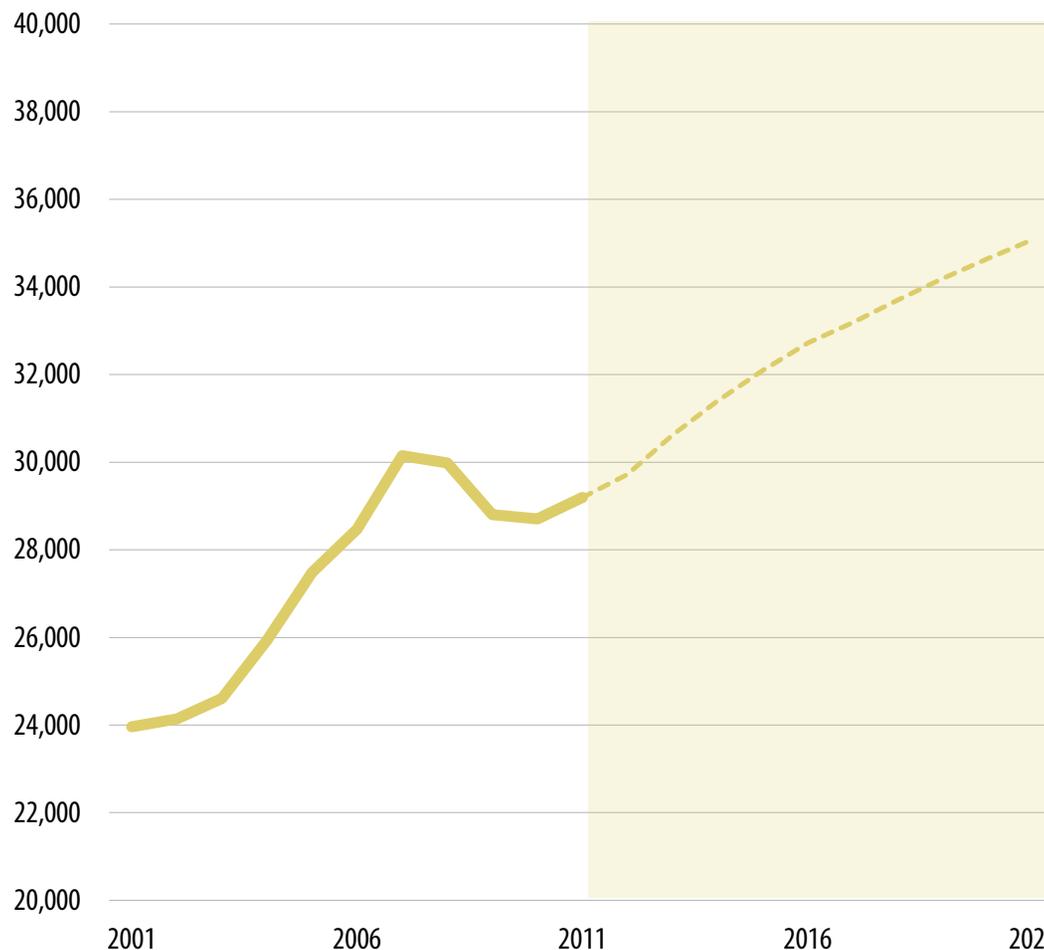
ECONOMY

Christian County's job base peaked at just over 30,000 in 2006. (EMSI counts both full and part time jobs in this number as well as self-employment work that is not covered by unemployment insurance.)

According to EMSI's projections, Christian County should regain all of its lost jobs before the end of 2013.

Looking further ahead, employment is projected to continue growing in the county, though the pace of growth is unlikely to be as rapid as it was preceding the Great Recession.

THE JOB BASE IN CHRISTIAN COUNTY



Source: EMSI Complete Employment - 2012.2.

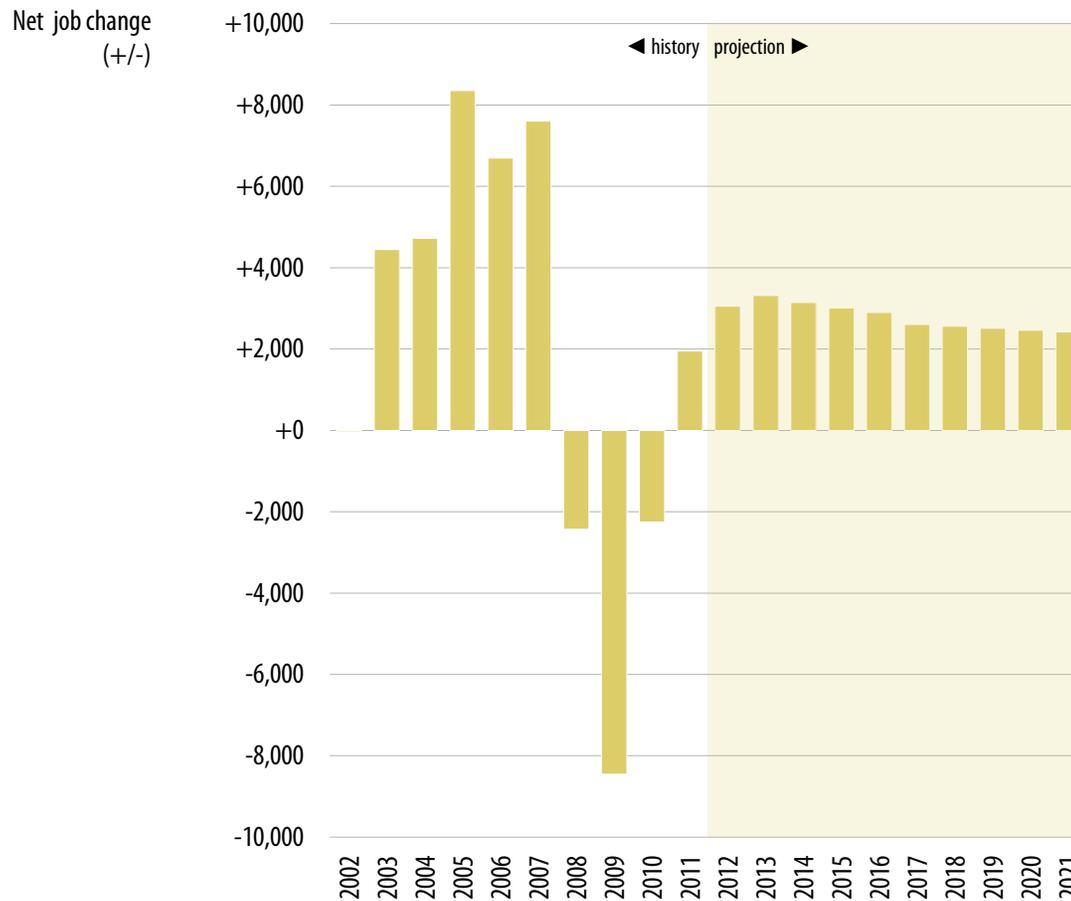
ECONOMY

Just ahead of the Great Recession, the Springfield MSA was adding 6,000-8,000 jobs annually.

The recovery will be more sobering, according to EMSI's projections. The MSA is expected to add 2,000 to 3,000 jobs annually, a far slower pace than the region experienced earlier.

ANNUAL NET JOB CHANGE IN THE SPRINGFIELD MSA

With projections for the decade ahead

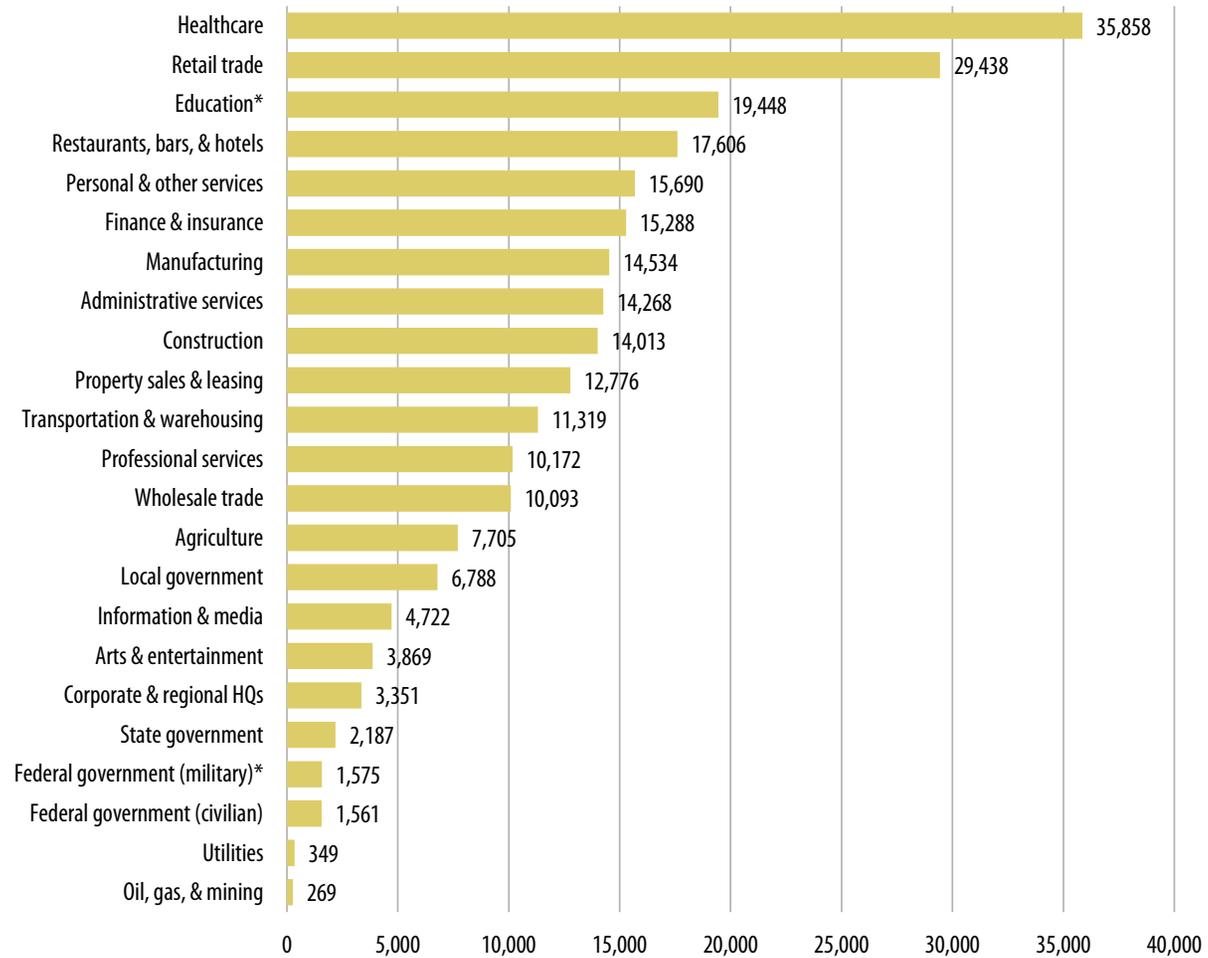


Source: EMSI Complete Employment - 2012.2.

ECONOMY

Healthcare and retail trades are the MSA's largest employing industries, by far, with 36,000 and 29,000 workers, respectively. The industries that follow next—education, restaurants / hotels, personal services, and finance / insurance—each employ between 15,000 and 20,000 workers.

JOB BASE BY INDUSTRY SECTOR IN THE SPRINGFIELD MSA, 2011

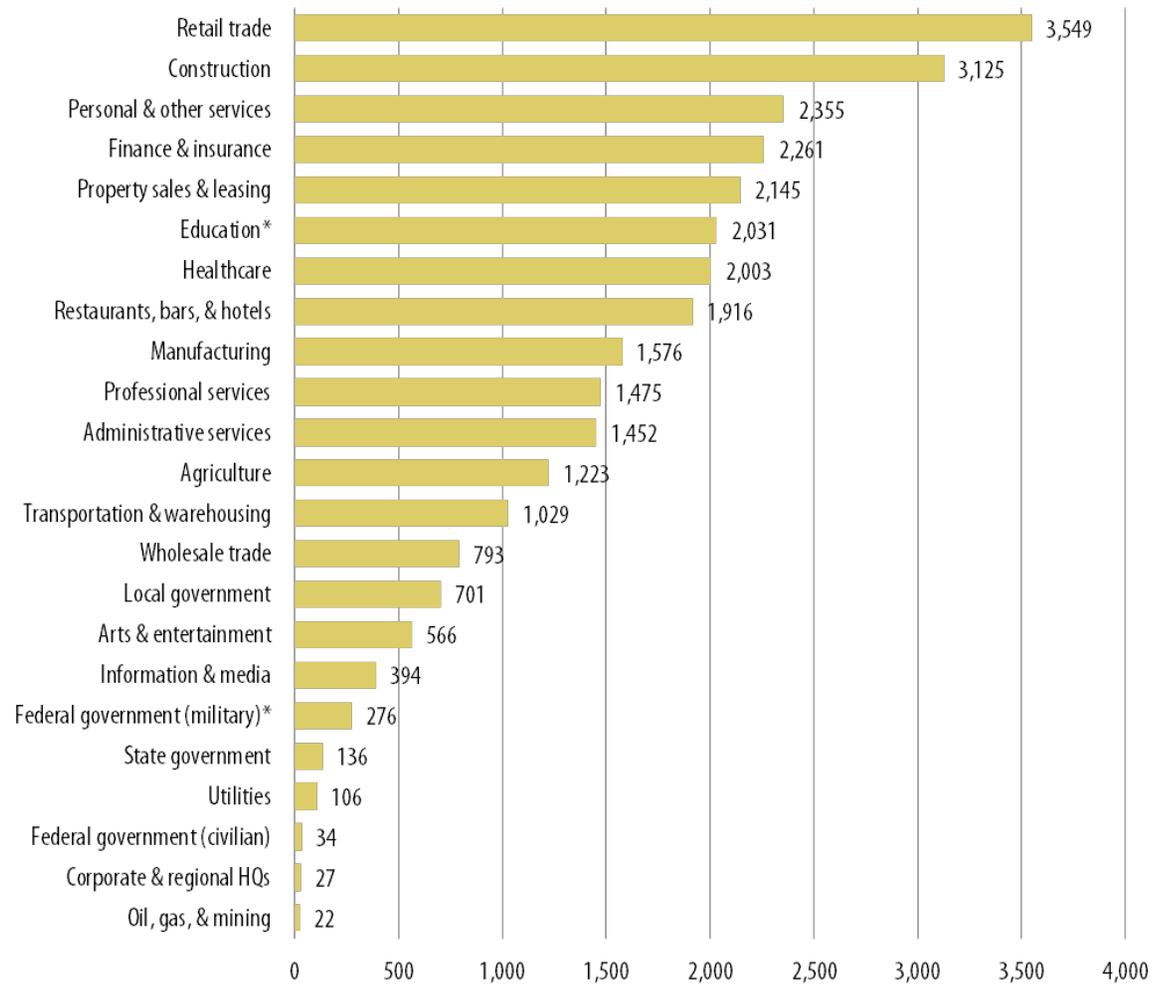


*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government.
 Source: EMSI Complete Employment - 2012.2.

ECONOMY

Retail and Construction are the largest industry sectors in Christian County, with over 3,000 workers in each sector. Personal & other services, finance & insurance, property sales & leasing, education, and healthcare each have over 2,000 workers.

JOB BASE BY INDUSTRY SECTOR IN CHRISTIAN COUNTY, 2011



*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government.

Source: EMSI Complete Employment - 2012.2.

ECONOMY

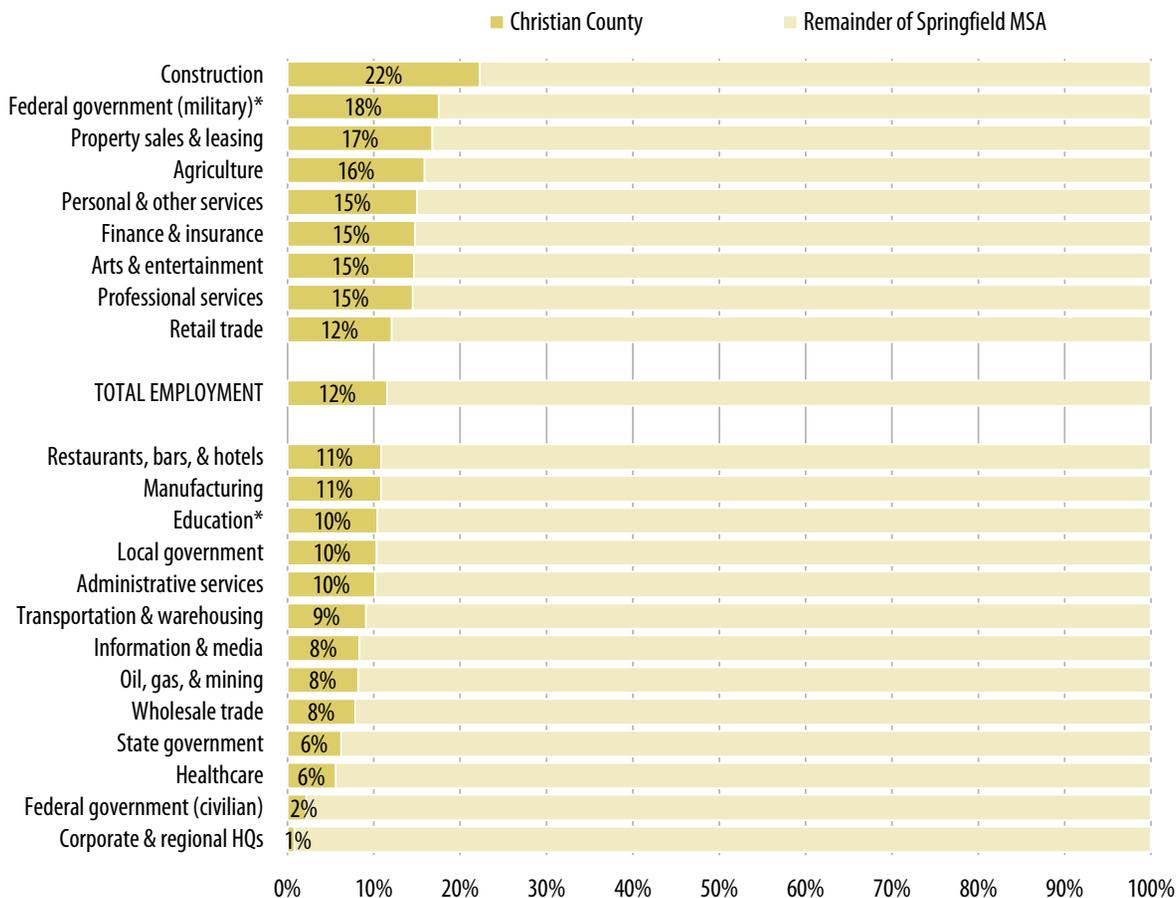
As of 2011, one in eight jobs in the Springfield MSA was located in Christian County, or about 12% of the regional job base.

The economic sectors in Christian County most closely tied to real estate—construction and property sales—support a disproportionately large share of the MSA labor market (22% and 17%, respectively).

The surprising laggard is the healthcare sector. Just 6% of the region's jobs in this sector are located in Christian County, which represents about 2,000 jobs. Yet, close to 4,500 workers from Christian County work in Greene County's healthcare sector.

DISTRIBUTION OF EXISTING JOBS BY INDUSTRY GROUP

Where jobs in the Springfield MSA were located as of 2011



*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government; military includes active duty as well as reserves.

Source: EMSI Complete Employment - 2012.2.

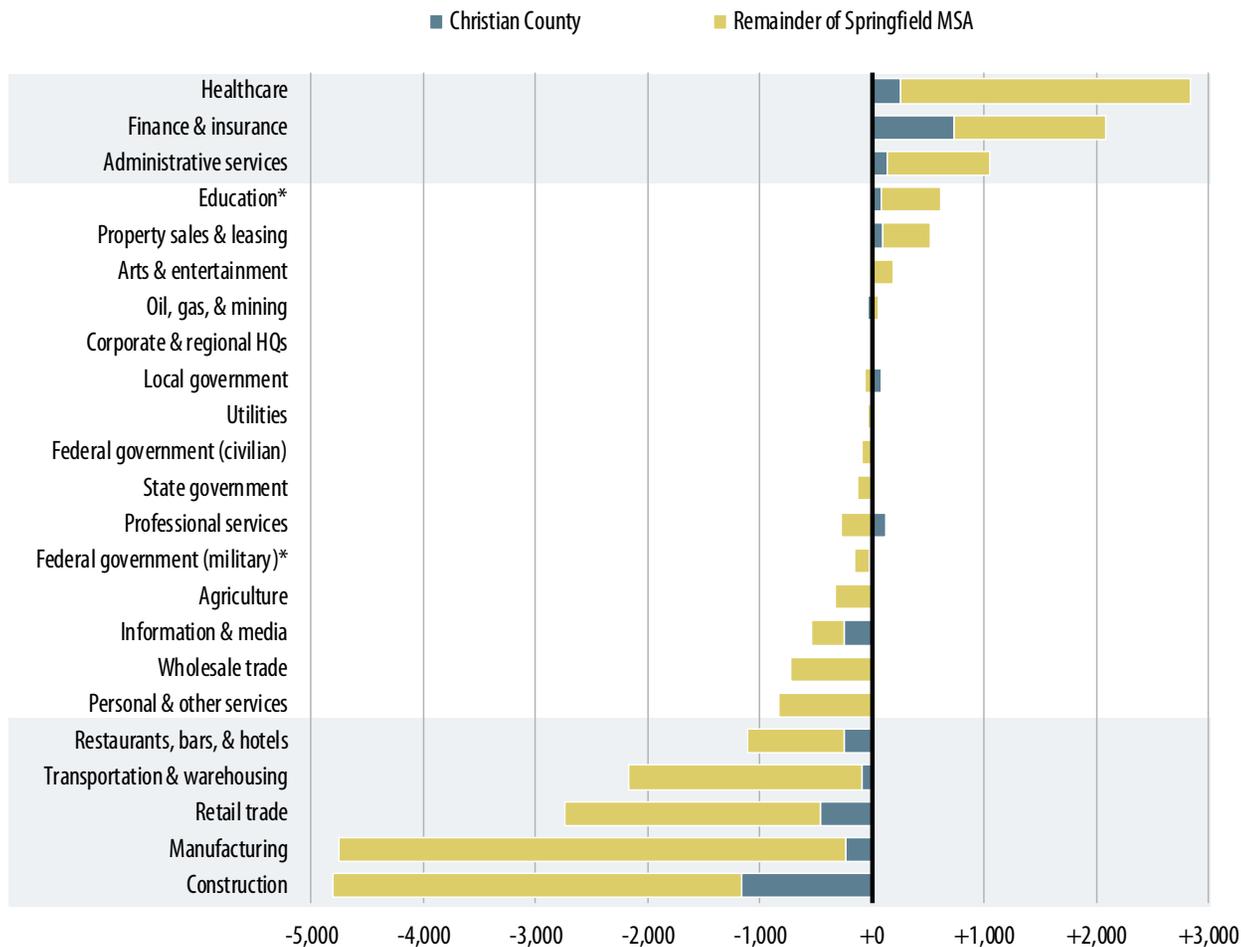
ECONOMY

Christian County's net job changes over the past four years have differed somewhat from the MSA on an industry-by-industry basis.

Healthcare has been a big gainer for the MSA overall, but less so in Christian County. On the other hand, Christian County has accounted for a relatively large slice of the MSA's recent gains in finance / insurance.

Construction job losses have been severe in Christian County, but manufacturing job losses have been relatively minor compared to the MSA total.

NET JOB CHANGE IN THE SPRINGFIELD MSA BY INDUSTRY, 2008-2011



*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government; military includes active duty as well as reserves.

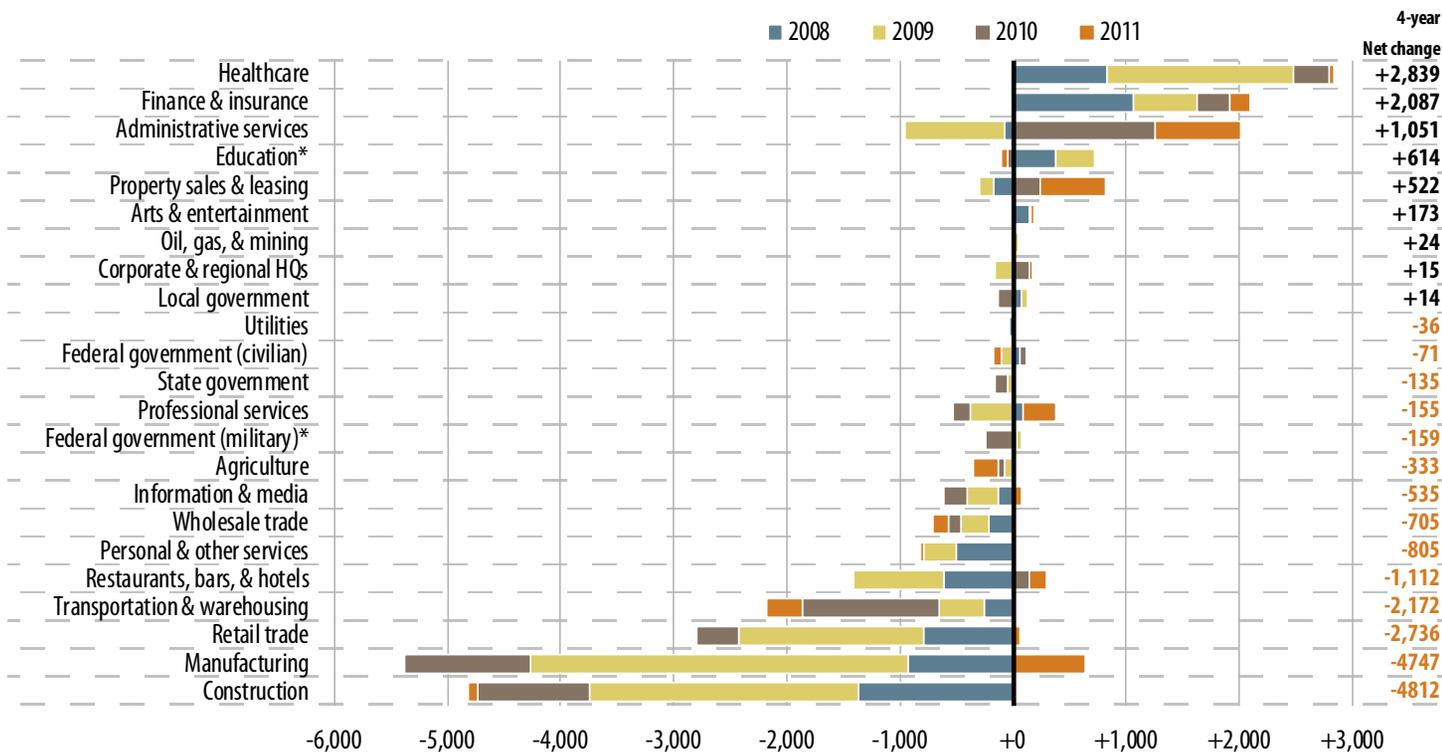
Source: EMSI Complete Employment - 2012.2.

ECONOMY

Healthcare and finance/insurance were two sectors that had job gains in each of the past four consecutive years. In both of these sectors, however, the pace of growth has slowed in the last two years as other sectors of the economy have picked up steam. Some sectors that lost jobs in the recession, eventually bounced back strongly. Administrative services fit this description, as does property sales & leasing, and professional services. Even manufacturing showed the first signs of a solid recovery in 2011.

SPRINGFIELD MSA JOB TRENDS BY ECONOMIC SECTOR SINCE 2008

A wide gap in the types of jobs gained and lost during the recession



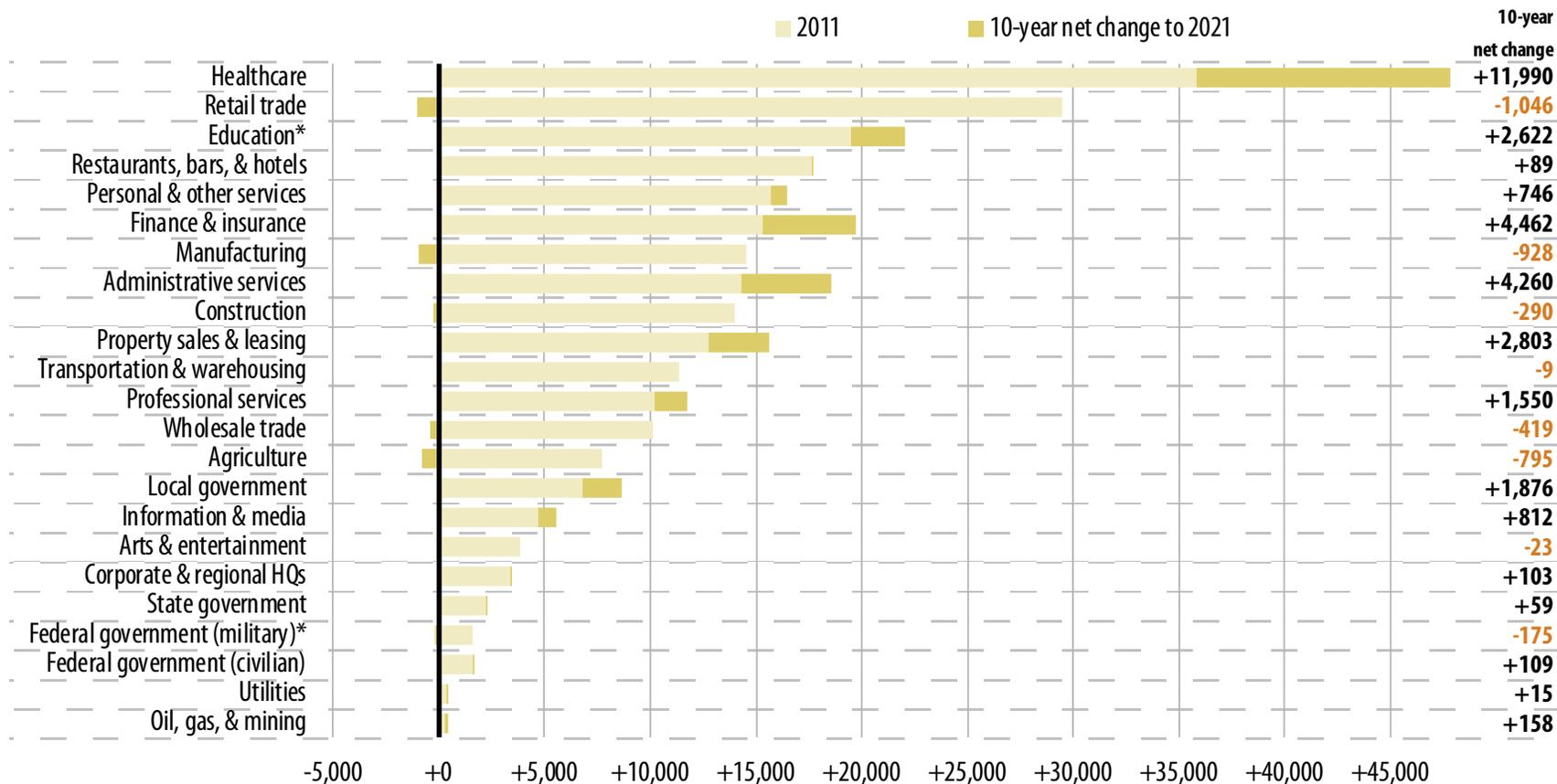
*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government; military includes active duty as well as reserves.

Source: EMSI Complete Employment - 2012.2.

ECONOMY

Healthcare is the sector best positioned to add jobs in the MSA in the decade ahead. Nearly 12,000 new healthcare-related jobs are projected according to EMSI's latest forecast. Finance and insurance and administrative services are each expected to add over 4,000 jobs each.

SPRINGFIELD MSA'S JOB BASE IN 2011 + FORECAST 10-YEAR CHANGE

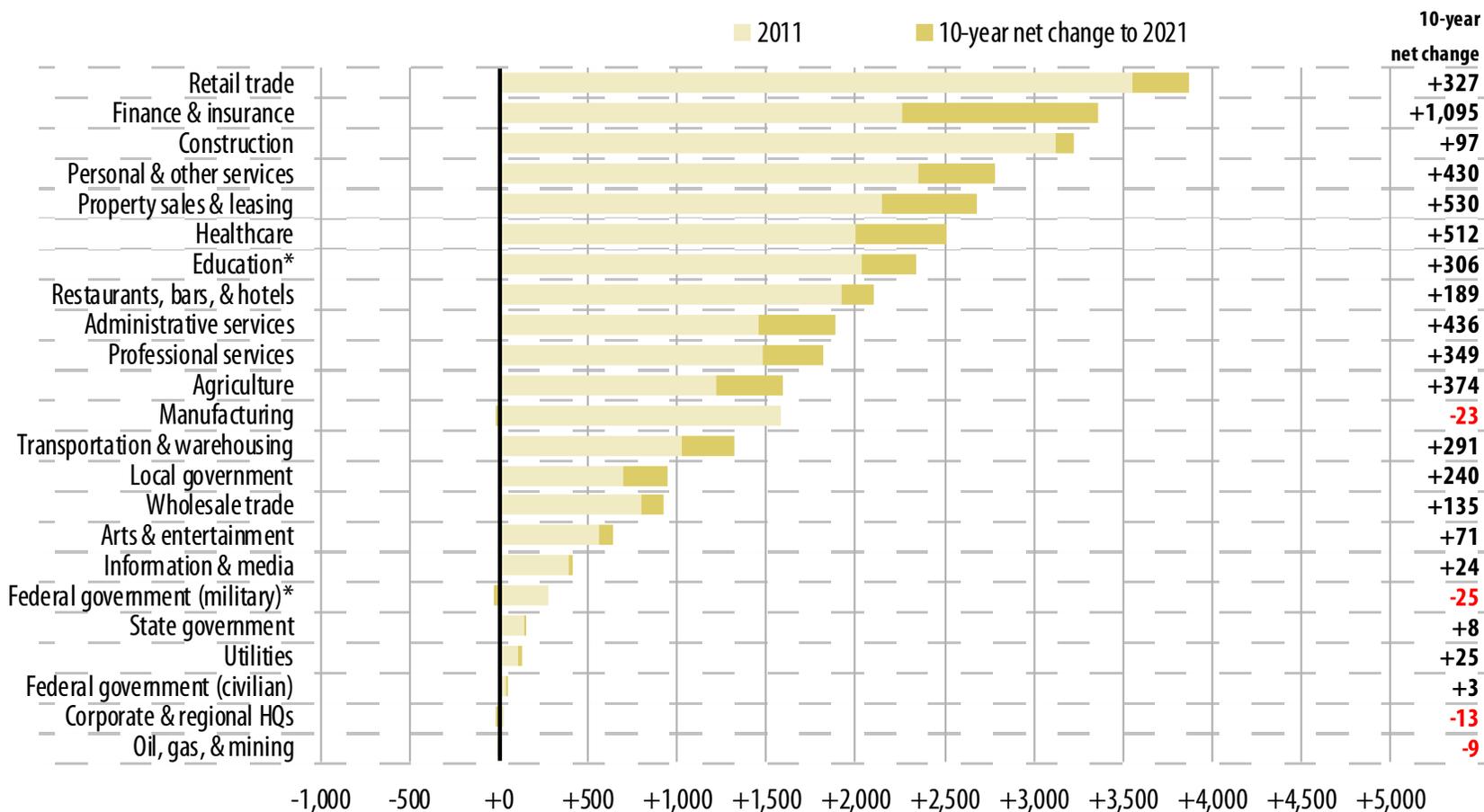


*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government; military includes active duty as well as reserves.
Source: EMSI Complete Employment - 2012.2.

ECONOMY

Finance and insurance is the sector best positioned to add jobs in the county in the decade ahead. Just over 1,000 new finance and insurance jobs are projected according to EMSI's latest forecast. Property sales and leasing as well as the healthcare sector are each expected to add over 500 jobs.

CHRISTIAN COUNTY'S JOB BASE IN 2011 + FORECAST 10-YEAR CHANGE



*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government; military includes active duty as well as reserves.

Source: EMSI Complete Employment - 2012.2.

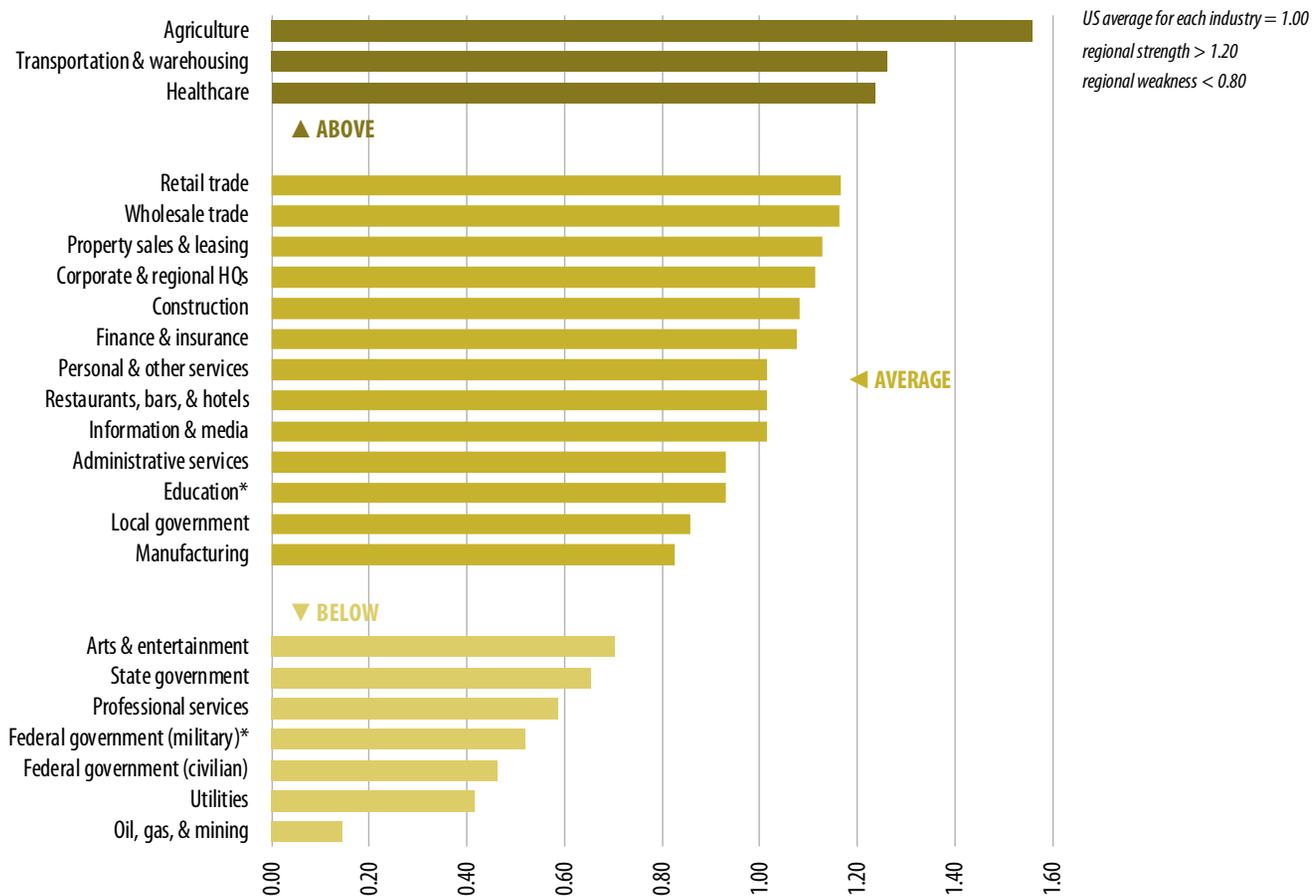
ECONOMY

Agriculture, transportation / warehousing, and healthcare are the sectors in the MSA with above average job concentration ratios (i.e. greater than 1.20). It is somewhat unusual to see an MSA of moderate size with a high LQ in agriculture. This usually occurs only in rural areas.

The professional services sector is sparsely represented in the MSA, according to LQ analysis. Again, it is unusual to see this sector with such a low LQ in an MSA of this size. Low LQs in this sector usually occur more frequently in rural areas.

SPRINGFIELD MSA INDUSTRY SECTOR STRENGTHS RELATIVE TO THE US

Location quotient analysis



*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government; military includes active duty as well as reserves.

Source: EMSI Complete Employment - 2012.2.

ECONOMY

INDUSTRY SECTOR STRENGTHS RELATIVE TO THE US

Location quotients for the Springfield MSA at the 6-digit NAICS level

Based on industries that employed at least 500 workers in the MSA in 2011

Location quotient descriptions:

- extremely high (> 2.50)
- above average (>1.20)
- average (between 0.80 and 1.20)
- below average (<0.80)

NAICS Classification			Level in 2011				Net Chg Since 2001
Broad sector	6-digit code & description		LQ	Jobs	Avg. Earnings	No. of Estabs.	Net Job Gain (Loss)
Manufacturing	311513	Cheese Manufacturing	19.37	1,180	\$56,661	2	+92
Healthcare	621991	Blood and Organ Banks	9.81	1,048	\$45,909	6	+772
Manufacturing	333618	Other Engine Equipment Manufacturing	9.79	597	\$64,509	3	+415
Finance & insurance	522210	Credit Card Issuing	9.16	1,344	\$38,440	2	+890
Transportation & warehousing	493120	Refrigerated Warehousing and Storage	8.17	635	\$62,742	3	+103
Transportation & warehousing	484230	Specialized Freight (except Used Goods) Trucking, Long-Distance	5.90	1,029	\$51,409	57	-794
Information & media	517911	Telecommunications Resellers	5.36	752	\$25,332	11	+676
Administrative services	561422	Telemarketing Bureaus and Other Contact Centers	4.83	2,856	\$31,712	17	+1,522
Retail trade	454113	Mail-Order Houses	4.65	1,109	\$43,258	8	+209
Wholesale trade	423110	Automobile and Other Motor Vehicle Merchant Wholesalers	4.55	758	\$44,485	21	+383
Wholesale trade	423120	Motor Vehicle Supplies and New Parts Merchant Wholesalers	3.86	920	\$40,928	28	+460
Agriculture	112000	Animal Production	3.43	5,775	\$24,621	24	+1,293
Transportation & warehousing	484121	General Freight Trucking, Long-Distance, Truckload	2.69	3,070	\$50,919	67	-955
Retail trade	453310	Used Merchandise Stores	2.48	1,004	\$12,476	51	+203
Healthcare	622110	General Medical and Surgical Hospitals (Private)	2.17	13,521	\$49,175	6	+2,176
Education*	903612	Colleges, Universities, and Professional Schools (Local Government)	2.02	1,980	\$21,551	3	+848
Retail trade	451110	Sporting Goods Stores	1.98	816	\$20,167	33	-216
Transportation & warehousing	484122	General Freight Trucking, Long-Distance, Less Than Truckload	1.97	726	\$65,676	18	+93
Retail trade	452112	Discount Department Stores	1.95	2,720	\$22,977	14	+1,449
Information & media	511110	Newspaper Publishers	1.95	764	\$49,042	13	+221
Information & media	517210	Wireless Telecommunications Carriers (except Satellite)	1.92	512	\$72,164	24	+238
Wholesale trade	424410	General Line Grocery Merchant Wholesalers	1.91	629	\$58,235	6	-175
Retail trade	441120	Used Car Dealers	1.90	665	\$38,803	62	+36
Wholesale trade	424490	Other Grocery and Related Products Merchant Wholesalers	1.77	578	\$49,144	21	-83

NAICS Classification			Level in 2011				Net Chg Since 2001
Broad sector	6-digit code & description		LQ	Jobs	Avg. Earnings	No. of Estabs.	Net Job Gain (Loss)
Healthcare	623210	Residential Mental Retardation Facilities	1.77	1,049	\$20,669	20	+869
Construction	238140	Masonry Contractors	1.74	561	\$33,536	42	+38
Construction	238110	Poured Concrete Foundation and Structure Contractors	1.69	563	\$32,937	49	-99
Transportation & warehousing	482110	Rail Transportation	1.65	517	\$79,742	0	-77
Construction	238160	Roofing Contractors	1.58	546	\$38,044	40	+103
Personal & other services	813110	Religious Organizations	1.54	4,152	\$13,257	2	+320
Property sales & leasing	531110	Lessors of Residential Buildings and Dwellings	1.51	2,786	\$23,397	116	+1,363
Finance & insurance	524126	Direct Property and Casualty Insurance Carriers	1.51	1,049	\$54,512	41	+108
Personal & other services	813410	Civic and Social Organizations	1.50	900	\$10,604	35	+156
Finance & insurance	522110	Commercial Banking	1.40	2,689	\$57,288	167	+312
Construction	238310	Drywall and Insulation Contractors	1.40	697	\$29,615	56	-230
Finance & insurance	524210	Insurance Agencies and Brokerages	1.36	2,407	\$39,946	258	+556
Restaurants, bars, & hotels	722211	Limited-Service Restaurants	1.36	6,915	\$13,819	328	+1,404
Retail trade	452910	Warehouse Clubs and Supercenters	1.33	2,232	\$28,241	7	-683
Personal & other services	811121	Automotive Body, Paint, and Interior Repair and Maintenance	1.31	537	\$35,491	75	-167
Personal & other services	811111	General Automotive Repair	1.30	880	\$32,291	142	-47
Property sales & leasing	531130	Lessors of Miniwarehouses and Self-Storage Units	1.30	724	\$26,667	34	+422
Construction	236118	Residential Remodelers	1.29	1,071	\$34,773	93	+410
Healthcare	623110	Nursing Care Facilities	1.25	3,003	\$30,685	34	+254
Retail trade	454390	Other Direct Selling Establishments	1.24	1,881	\$10,155	24	-608
Property sales & leasing	531120	Lessors of Nonresidential Buildings (except Miniwarehouses)	1.24	1,249	\$39,831	59	+487
Retail trade	447110	Gasoline Stations with Convenience Stores	1.24	1,338	\$22,161	172	+53
Retail trade	453998	All Other Miscellaneous Store Retailers (except Tobacco Stores)	1.23	590	\$25,274	35	-93
Retail trade	441310	Automotive Parts and Accessories Stores	1.22	633	\$28,879	62	-84
Retail trade	453220	Gift, Novelty, and Souvenir Stores	1.22	522	\$16,635	42	-278
Personal & other services	811490	Other Personal and Household Goods Repair and Maintenance	1.21	541	\$19,002	13	+53
Construction	238350	Finish Carpentry Contractors	1.20	625	\$18,452	39	+124
Finance & insurance	523930	Investment Advice	1.17	1,917	\$22,753	17	+1,076
Construction	238990	All Other Specialty Trade Contractors	1.16	1,040	\$24,381	53	+220
Retail trade	443112	Radio, Television, and Other Electronics Stores	1.15	574	\$37,091	49	+131
Corporate & regional HQs	551114	Corporate, Subsidiary, and Regional Managing Offices	1.15	3,318	\$67,558	108	+549
Professional services	541940	Veterinary Services	1.14	527	\$27,112	61	+171
Finance & insurance	524114	Direct Health and Medical Insurance Carriers	1.12	574	\$62,198	10	-116
Construction	238320	Painting and Wall Covering Contractors	1.11	734	\$18,378	47	+125

NAICS Classification			Level in 2011			Net Chg Since 2001	
Broad sector	6-digit code & description		LQ	Jobs	Avg. Earnings	No. of Estabs.	Net Job Gain (Loss)
Healthcare	621210	Offices of Dentists	1.11	1,420	\$59,146	153	+375
Transportation & warehousing	493110	General Warehousing and Storage	1.11	971	\$33,671	19	+23
Retail trade	441110	New Car Dealers	1.11	1,462	\$57,030	27	-278
Education*	902612	Colleges, Universities, and Professional Schools (State Government)	1.10	3,787	\$45,995	1	+715
Transportation & warehousing	901149	US Postal Service	1.10	1,001	\$68,755	45	-249
Healthcare	621610	Home Health Care Services	1.09	2,381	\$29,735	16	+936
Finance & insurance	523120	Securities Brokerage	1.07	751	\$51,125	60	+284
Construction	238220	Plumbing, Heating, and Air-Conditioning Contractors	1.05	1,550	\$45,415	156	-18
Restaurants, bars, & hotels	722110	Full-Service Restaurants	1.05	6,971	\$16,113	319	+660
Professional services	541211	Offices of Certified Public Accountants	1.04	673	\$61,533	68	+107
Personal & other services	812990	All Other Personal Services	1.04	1,671	\$19,175	15	-29
Education*	611310	Colleges, Universities, and Professional Schools (Private)	1.03	2,604	\$28,420	10	-720
Finance & insurance	523920	Portfolio Management	1.03	1,461	\$15,354	18	+1,091
Property sales & leasing	531210	Offices of Real Estate Agents and Brokers	1.01	3,330	\$7,537	109	+1,445
Retail trade	446110	Pharmacies and Drug Stores	0.99	1,014	\$42,859	87	+224
Construction	236220	Commercial and Institutional Building Construction	0.99	860	\$51,943	88	-322
Construction	238910	Site Preparation Contractors	0.99	945	\$22,161	49	+23
Healthcare	624410	Child Day Care Services	0.98	2,503	\$13,155	90	-99
Healthcare	621111	Offices of Physicians (except Mental Health Specialists)	0.98	3,519	\$142,645	149	+871
Retail trade	452111	Department Stores (except Discount Department Stores)	0.97	784	\$22,606	4	-457
Personal & other services	812112	Beauty Salons	0.97	1,495	\$17,723	109	+414
Property sales & leasing	531390	Other Activities Related to Real Estate	0.96	1,747	\$9,132	6	+839
Retail trade	444110	Home Centers	0.95	870	\$29,002	19	+54
Administrative services	561730	Landscaping Services	0.94	1,599	\$17,540	162	+662
Arts & entertainment	713940	Fitness and Recreational Sports Centers	0.93	879	\$13,196	38	+148
Administrative services	561320	Temporary Help Services	0.93	3,056	\$21,584	23	+1,033
Construction	238210	Electrical Contractors and Other Wiring Installation Contractors	0.92	1,230	\$44,431	104	-164
Property sales & leasing	531311	Residential Property Managers	0.91	816	\$20,232	43	+254
Retail trade	448140	Family Clothing Stores	0.88	601	\$16,536	26	+188
Healthcare	903622	Hospitals (Local Government)	0.87	804	\$69,731	1	+218
Education*	903611	Elementary and Secondary Schools (Local Government)	0.87	8,862	\$45,291	154	+1,155
Government	903999	Local Government, Excluding Education and Hospitals	0.86	6,788	\$48,054	154	+1,295
Construction	236115	New Single-Family Housing Construction (except Operative Builders)	0.84	590	\$35,379	86	-752
Transportation & warehousing	492110	Couriers and Express Delivery Services	0.79	697	\$42,795	20	-37

NAICS Classification			Level in 2011				Net Chg Since 2001
Broad sector	6-digit code & description	LQ	Jobs	Avg. Earnings	No. of Estabs.	Net Job Gain (Loss)	
Arts & entertainment	711510 Independent Artists, Writers, and Performers	0.78	1,252	\$16,020	20	+316	
Administrative services	561720 Janitorial Services	0.77	2,220	\$14,840	98	+310	
Healthcare	624120 Services for the Elderly and Persons with Disabilities	0.76	889	\$21,603	36	+263	
Professional services	541110 Offices of Lawyers	0.76	1,512	\$70,816	230	+268	
Retail trade	445110 Supermarkets and Other Grocery (except Convenience) Stores	0.73	2,480	\$23,735	60	+110	
Professional services	541219 Other Accounting Services	0.73	575	\$24,617	65	+53	
Professional services	541990 All Other Professional, Scientific, and Technical Services	0.69	1,051	\$19,014	15	-43	
Government	902999 State Government, Excluding Education and Hospitals	0.65	2,187	\$48,983	69	+119	
Agriculture	111000 Crop Production	0.64	1,318	\$18,695	8	-3,016	
Restaurants, bars, & hotels	721110 Hotels (except Casino Hotels) and Motels	0.62	1,327	\$19,221	70	-4	
Restaurants, bars, & hotels	722310 Food Service Contractors	0.61	533	\$14,520	18	+244	
Information & media	517110 Wired Telecommunications Carriers	0.58	573	\$44,632	19	-762	
Administrative services	561612 Security Guards and Patrol Services	0.55	514	\$18,311	10	+98	
Government	901200 Federal Government, Military	0.52	1,575	\$28,145	0	+51	
Wholesale trade	425120 Wholesale Trade Agents and Brokers	0.48	591	\$55,677	137	-489	
Government	901199 Federal Government, Civilian, Excluding Postal Service	0.46	1,561	\$102,610	55	+263	
Personal & other services	814110 Private Households	0.44	1,116	\$6,960	485	+189	
Professional services	541511 Custom Computer Programming Services	0.42	521	\$51,760	44	+215	
Professional services	541611 Administrative Management and General Management Consulting Services	0.42	507	\$30,957	31	+251	
Professional services	541330 Engineering Services	0.38	537	\$59,110	61	+102	
Education*	611110 Elementary and Secondary Schools (Private)	0.36	510	\$15,743	8	+108	

*Note: Education includes all public schools, colleges, & universities, i.e., these jobs are not included with local or state government.

Source: EMSI Complete Employment - 2012.2.

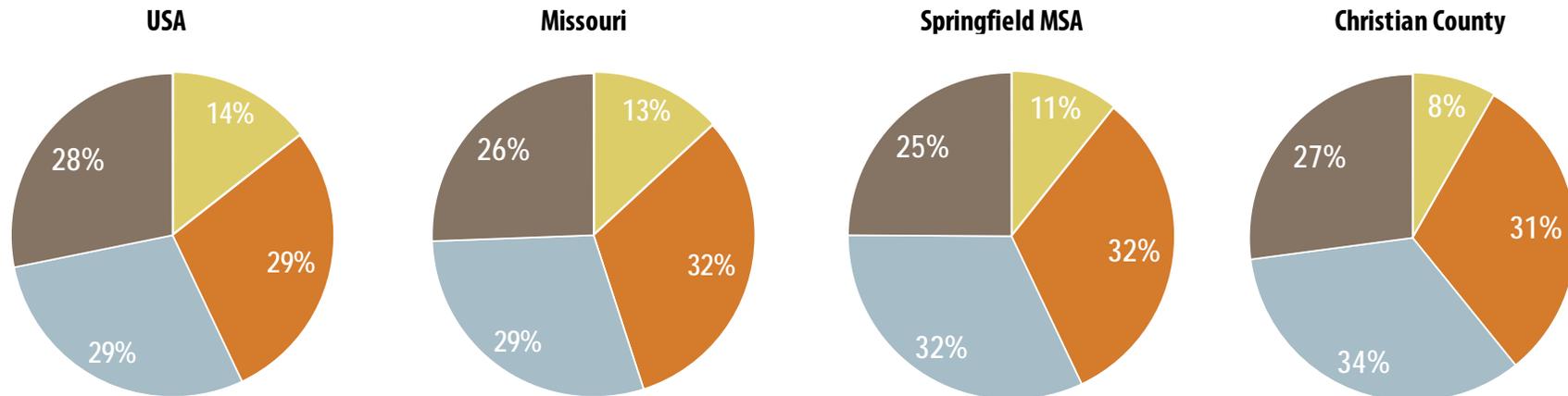
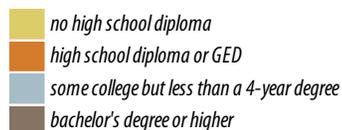
WORKFORCE

For educational attainment levels at the highest level (at least a 4-year degree), Christian County (27%) falls just between the statewide average (26%) and the national average (28%). In total, about 65% of the county's adult residents have attempted some level of college coursework, even if not an actual degree program, compared to 58% of adults nationwide.

At the other end of the educational attainment spectrum, Christian County holds a much stronger workforce advantage. Only 8% of the county's residents lack a high school diploma or GED. This exceeds the averages for the MSA (11%), the state (13%) and the US (14%).

EDUCATIONAL ATTAINMENT

Highest level of education achieved by the population age 25 or older



Source: U.S. Census Bureau (American Community Survey, 2010).

WORKFORCE

Sixteen institutions of higher education in the Springfield MSA together enroll just over 50,000 students. The MSA's two largest campuses—Missouri State University and Ozarks Technical Community College—together enroll roughly half of the MSA's students in tertiary educational programs. Ozarks Technical Community College is the only higher education institution with a campus in Christian County.

INSTITUTIONS OF HIGHER EDUCATION IN THE SPRINGFIELD MSA

Name	Latest Enrollment
Missouri State University	20,949
Ozarks Technical Community College	13,907
Drury University	5,625
Evangel University	2,072
University of Phoenix	1,700
Southwest Baptist University - Bolivar	1,588
Central Bible College	722
St. John's School of Nursing, SBU-Sprfld	640
Cox College of Nursing	626
Baptist Bible College	549
Everest College	402
Vatterott College	381
Forest Institute of Professional Psychology	303
Assemblies of God Theological Seminary	247
Webster University	235
Bryan Career College	158
	<u>50,104</u>

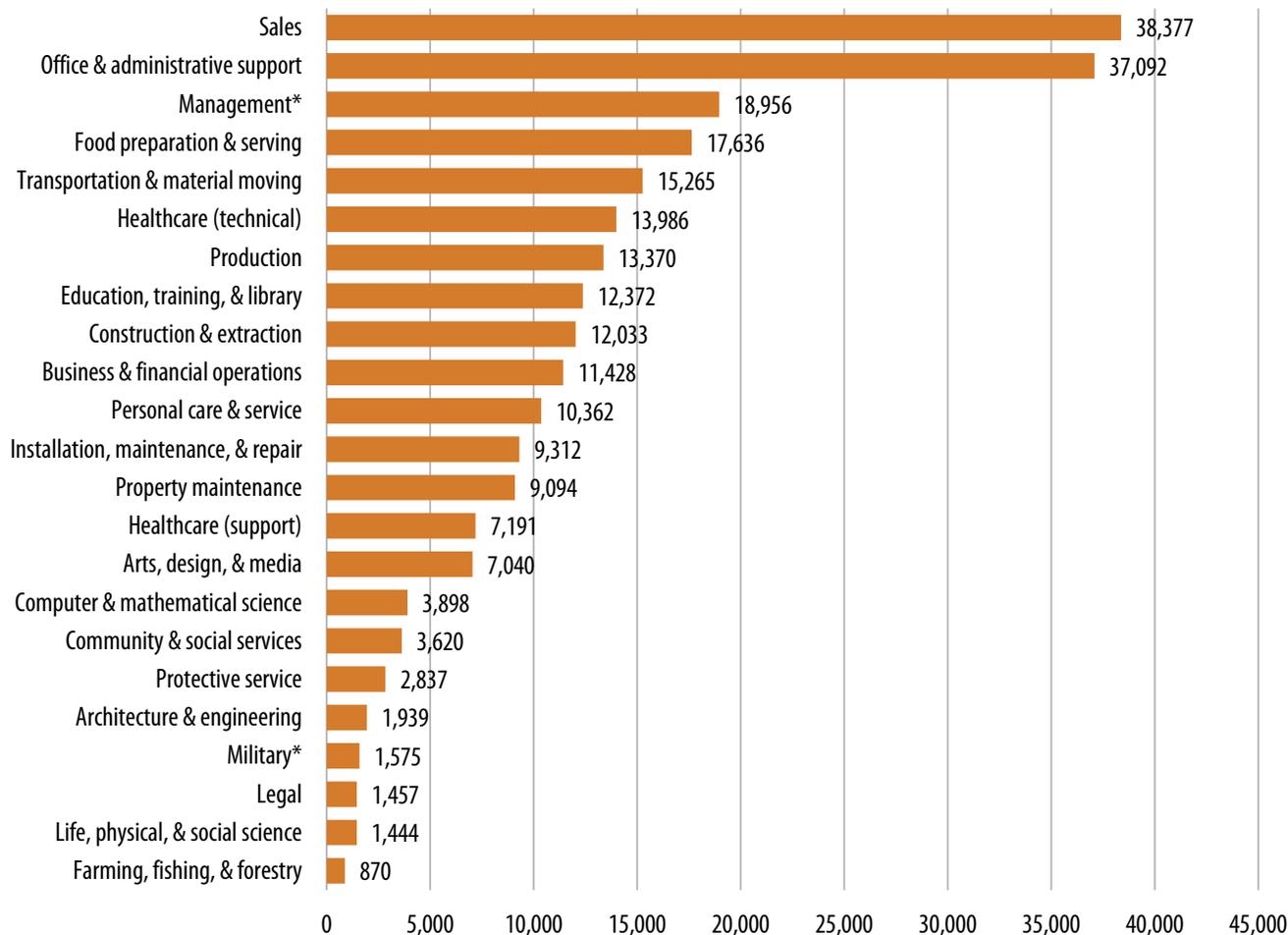
Source: Springfield Area Chamber of Commerce (Springfield MSA Demographic & Statistical Profile, 3rd Quarter, 2012).

WORKFORCE

Sales and administrative office occupations are the most common type of work in the Springfield MSA. Together they account for 75,000 jobs, or about 30% of the total job base.

Management occupations form a broad part of the job base. This group includes self-employed realtors, as well as construction managers. The management category also includes, among other things, self-employed farmers and ranchers. (A separate and much smaller "farming" occupational group includes mostly agricultural support workers.).

2011 JOB BASE BY OCCUPATIONAL GROUP IN THE SPRINGFIELD MSA



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

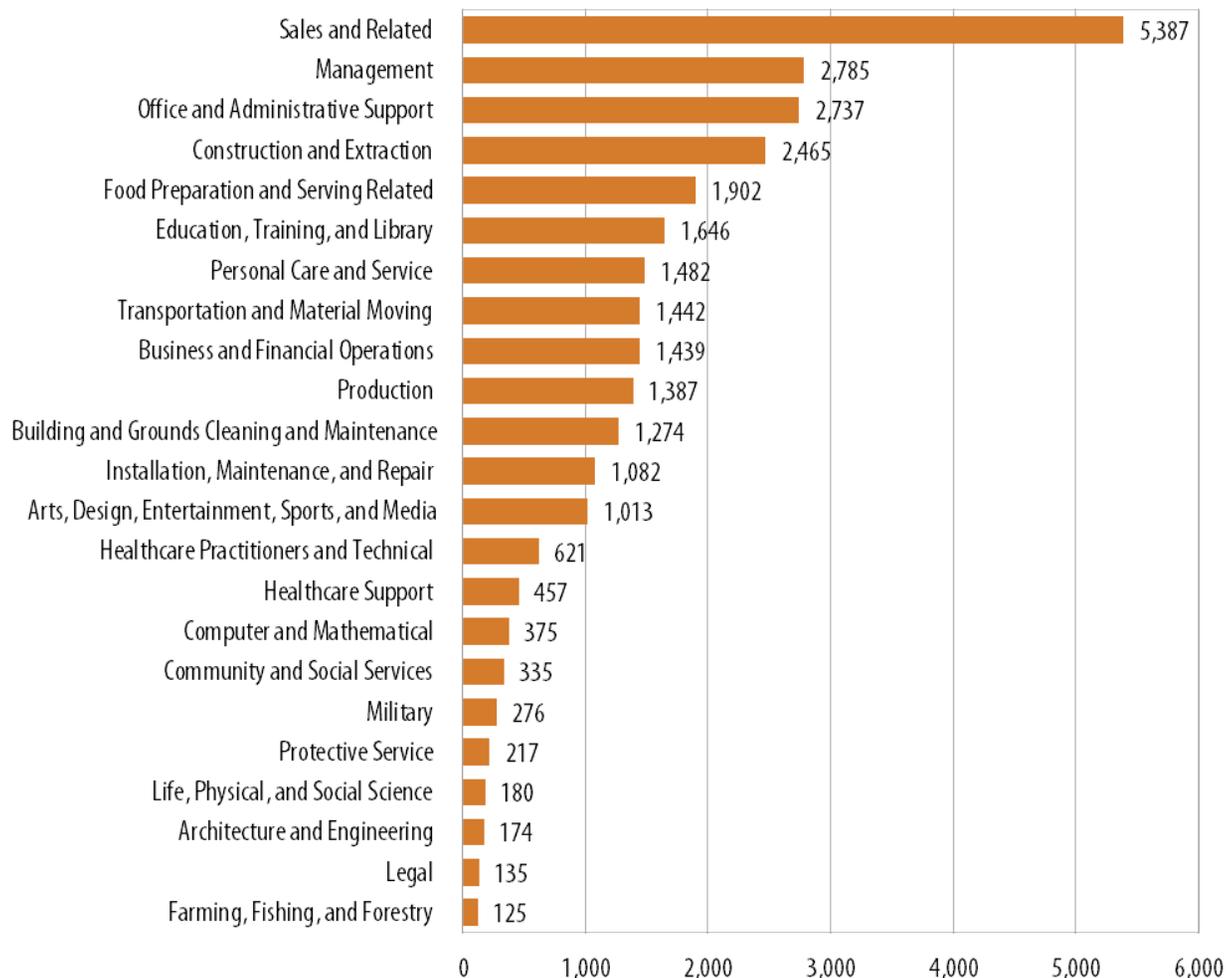
Source: EMSI Complete Employment - 2012.2.

WORKFORCE

Sales and management occupations are the most common type of work in Christian County. Together they account for 8,000 jobs, or about 28% of the total job base.

Management occupations form a broad part of the job base. This group includes self-employed realtors, as well as construction managers. The management category also includes, among other things, self-employed farmers and ranchers. (A separate and much smaller "farming" occupational group includes mostly agricultural support workers.).

2011 JOB BASE BY OCCUPATIONAL GROUP IN CHRISTIAN COUNTY



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

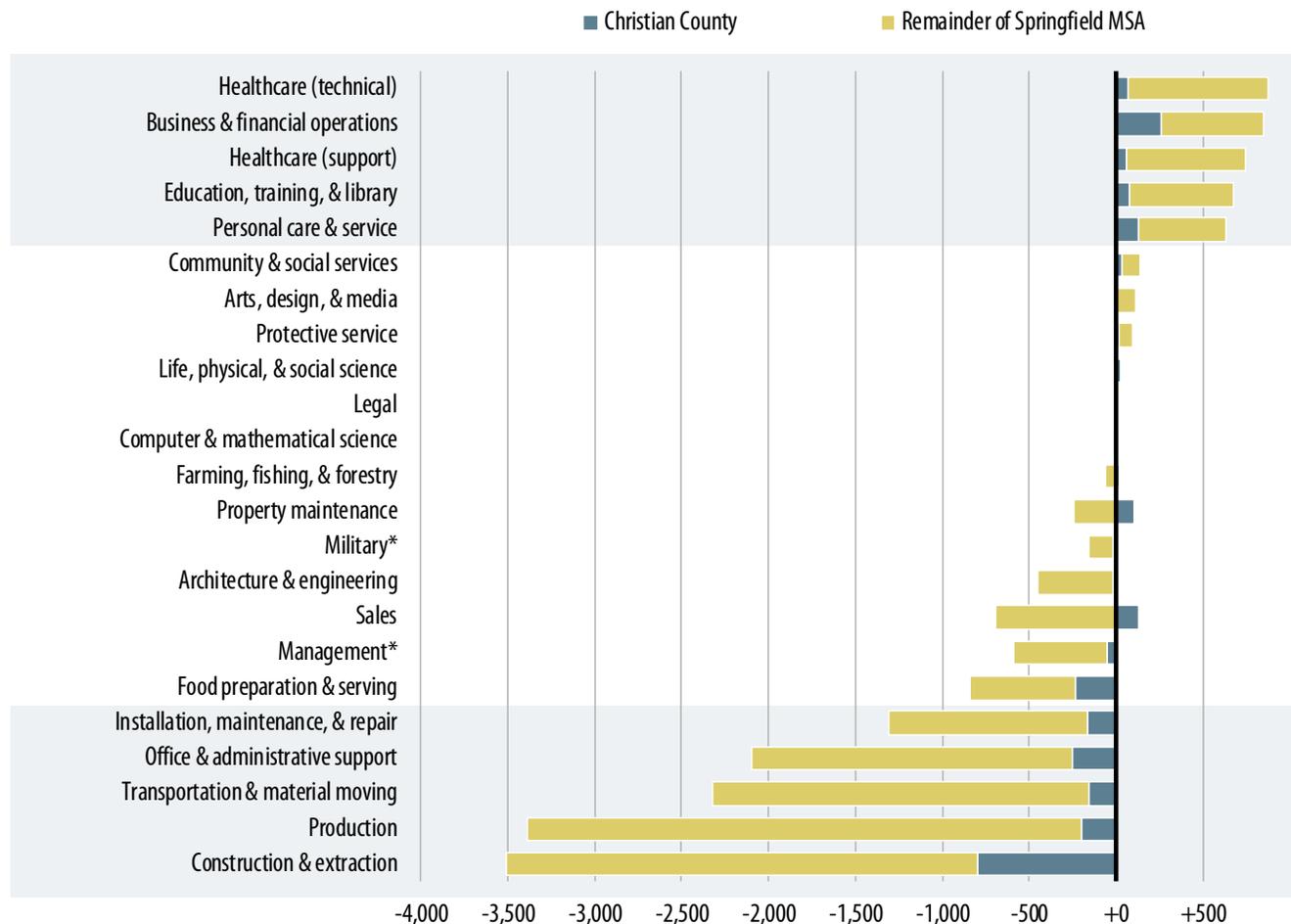
Source: EMSI Complete Employment - 2012.2.

WORKFORCE

Only five occupational groups in the MSA have added 500 or more jobs since 2008. (This period includes both the recession and the subsequent recovery.) Christian County has successfully added jobs in one of these categories, business and financial occupations, but the county has added far fewer jobs in the other relatively fast growing occupational groups associated with healthcare and education.

Like the MSA overall, Christian County shed more jobs in construction occupations in the 2008-2011 period than any other type of work.

NET JOB CHANGE IN THE SPRINGFIELD MSA BY OCCUPATIONAL GROUP, 2008-2011



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

Source: EMSI Complete Employment - 2012.2.

WORKFORCE

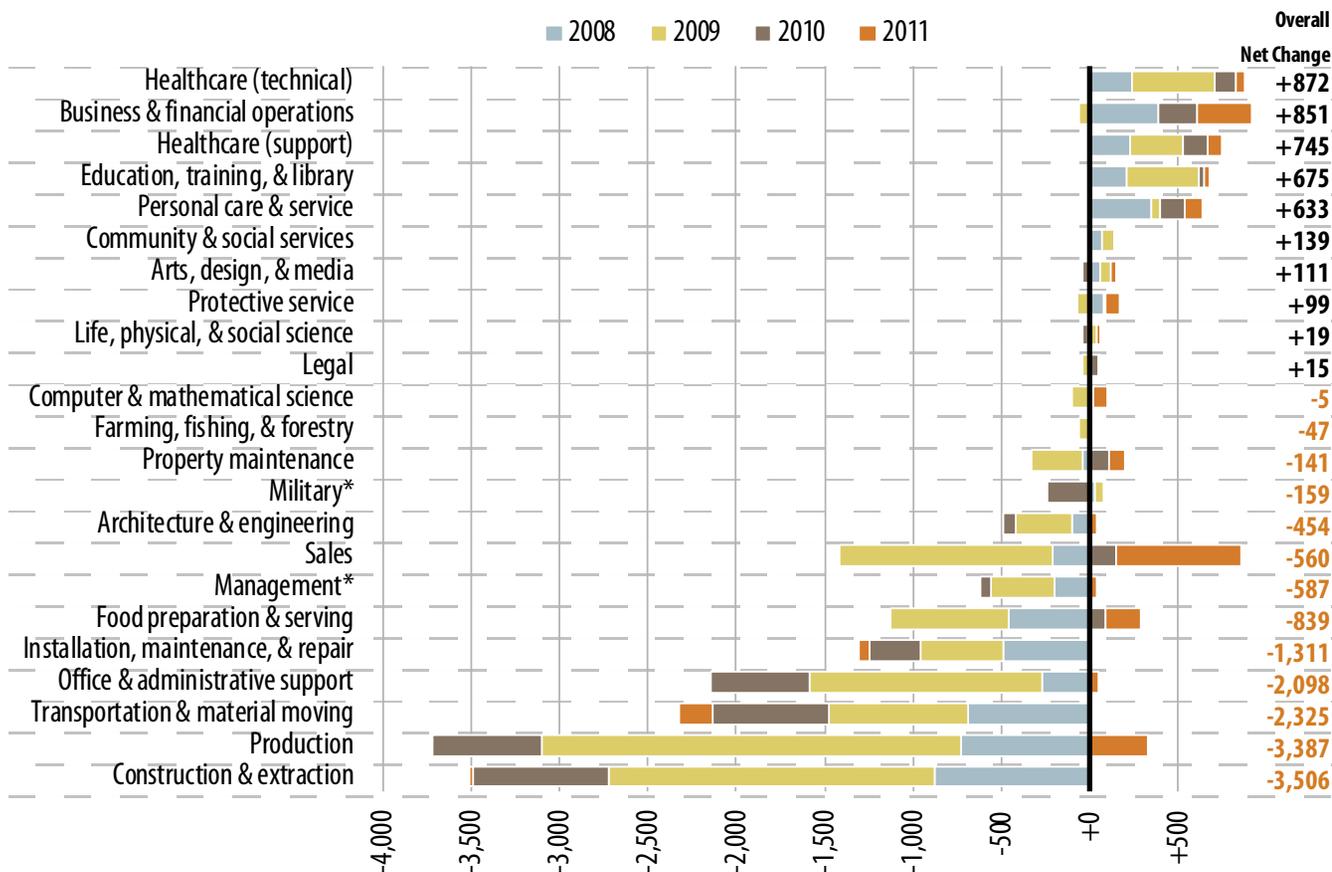
Job performance over the past four years in the Springfield MSA has differed across occupational groups. Occupations associated with construction, production, transportation, and admin support were among those suffering the steepest losses.

Other occupations have grown steadily during this same period. Healthcare and business-oriented occupations have gained the most traction.

Consumer-oriented occupational groups like sales and food services suffered initial job losses during the recession but were quick to rebound.

OCCUPATIONAL JOB TRENDS IN THE SPRINGFIELD MSA, 2008 THROUGH 2011

Wide differences in occupational volatility over the past four years



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

Source: EMSI Complete Employment - 2012.2.

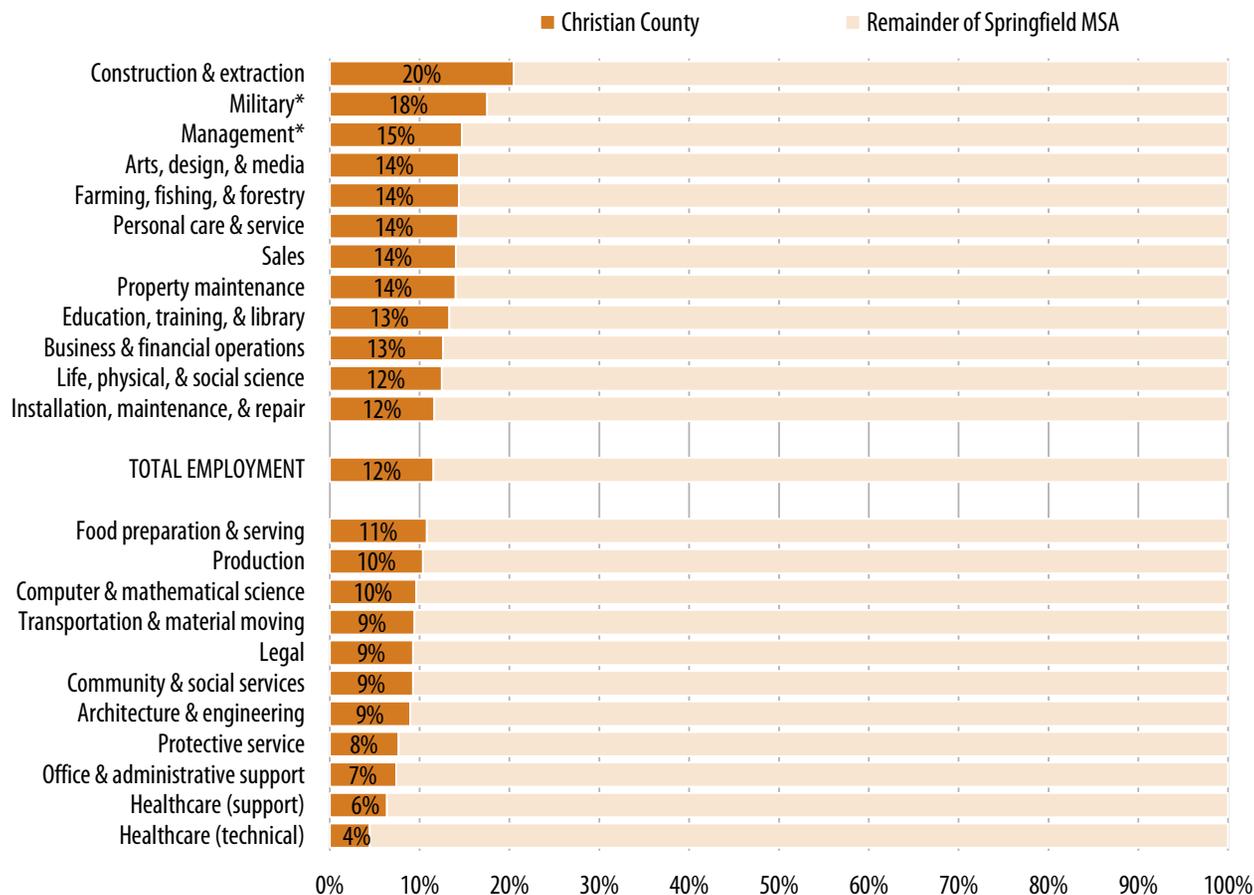
WORKFORCE

As noted in the industry data earlier, those economic sectors in Christian County most closely tied to real estate (i.e., construction and property sales) support a disproportionately large share of the MSA labor market. The occupational data (shown here) echo this pattern, with construction / extraction occupations, management occupations (this includes self-employed realtors), and property maintenance occupations showing very high ratios of county employment.

Jobs in Christian County for those workers trained in health careers, whether in technical or support fields, make up a tiny share of the overall job market in greater Springfield.

DISTRIBUTION OF EXISTING JOBS BY OCCUPATIONAL GROUP

Where jobs in the Springfield MSA were located as of 2011



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

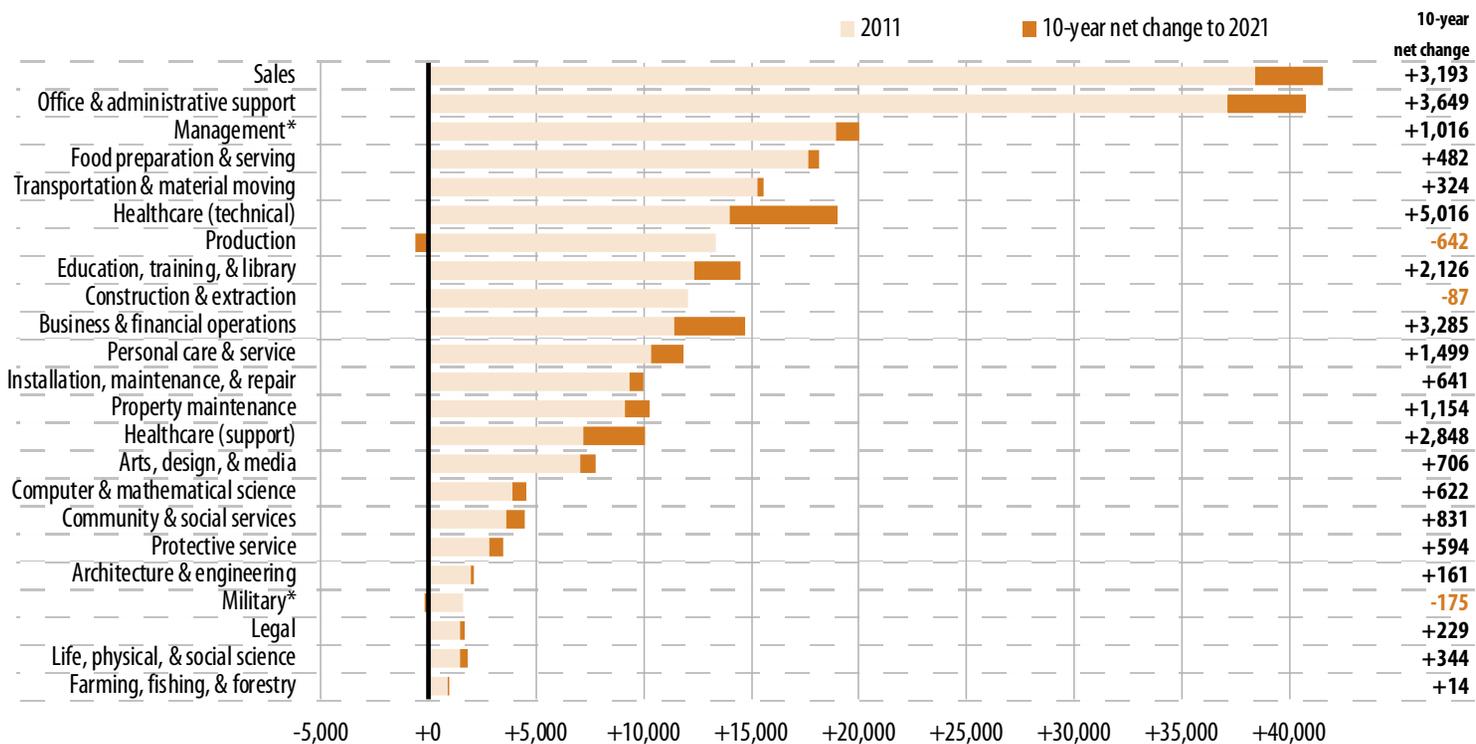
Source: EMSI Complete Employment - 2012.2.

WORKFORCE

As noted earlier, technical professions in healthcare in Christian County make up just 4% of the MSA's total jobs in this occupational group. This is significant since this occupational group was the sixth largest in the MSA as of 2011, and it is projected to be the biggest job gainer of the coming decade, with at least 5,000 new jobs expected in the region for healthcare professionals and technical workers (plus more for support workers).

Service-oriented occupations, including sales, admin support, and business/finance, are projected to gain at least 3,000 new jobs each between 2011 and 2021.

SPRINGFIELD MSA'S JOB BASE IN 2011 + FORECAST 10-YEAR CHANGE



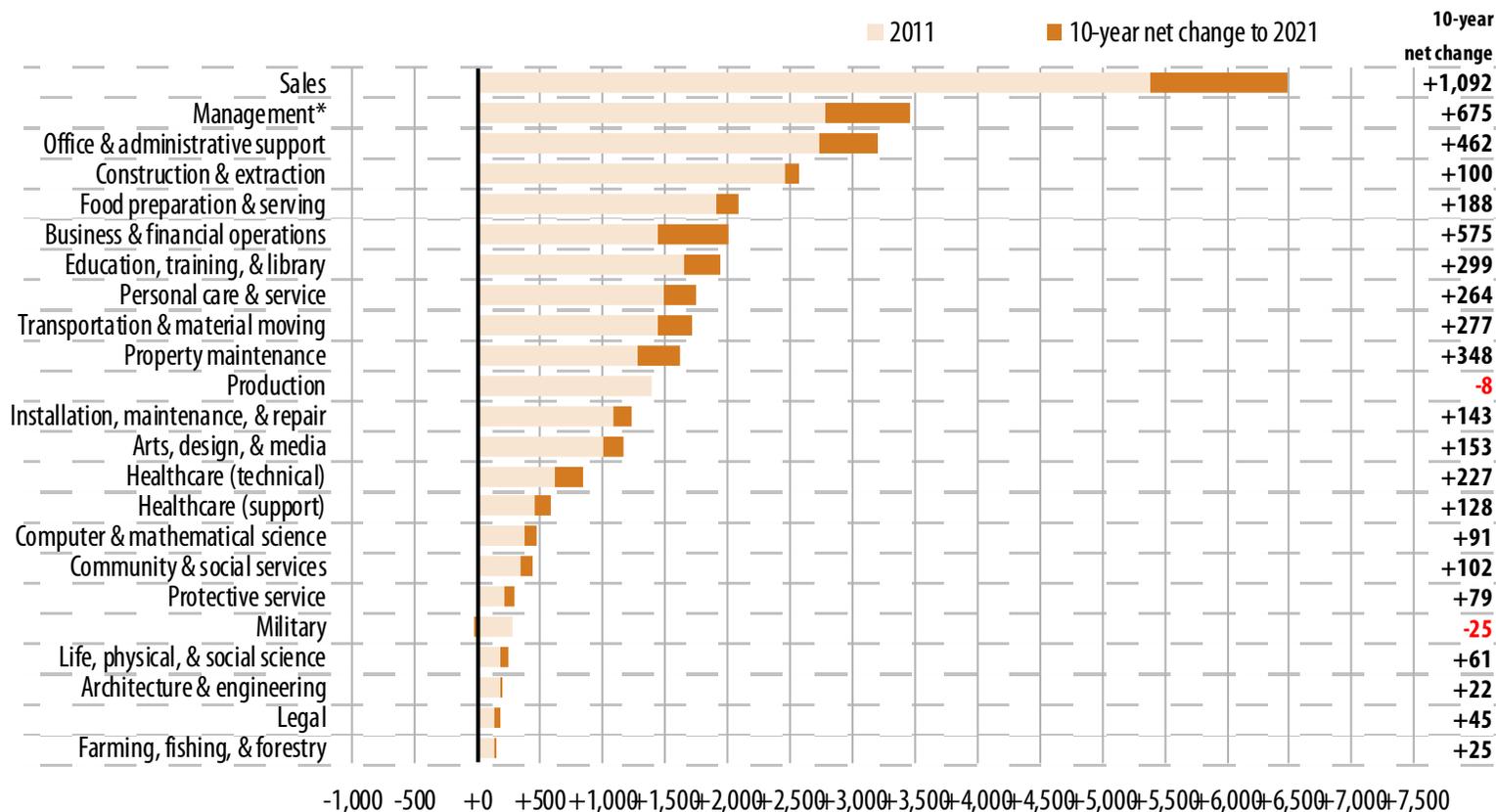
*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

Source: EMSI Complete Employment - 2012.2.

WORKFORCE

In Christian County, sales, management, and business and financial operations are the occupational groups expected to experience the largest increases over the next 10 years. This growth is in-sync with the MSA as a whole. As noted previously, growth in healthcare professions is expected to be relatively low, particularly when compared to the growth in the region.

CHRISTIAN COUNTY'S JOB BASE IN 2011 + FORECAST 10-YEAR CHANGE



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

Source: EMSI Complete Employment - 2012.2.

WORKFORCE

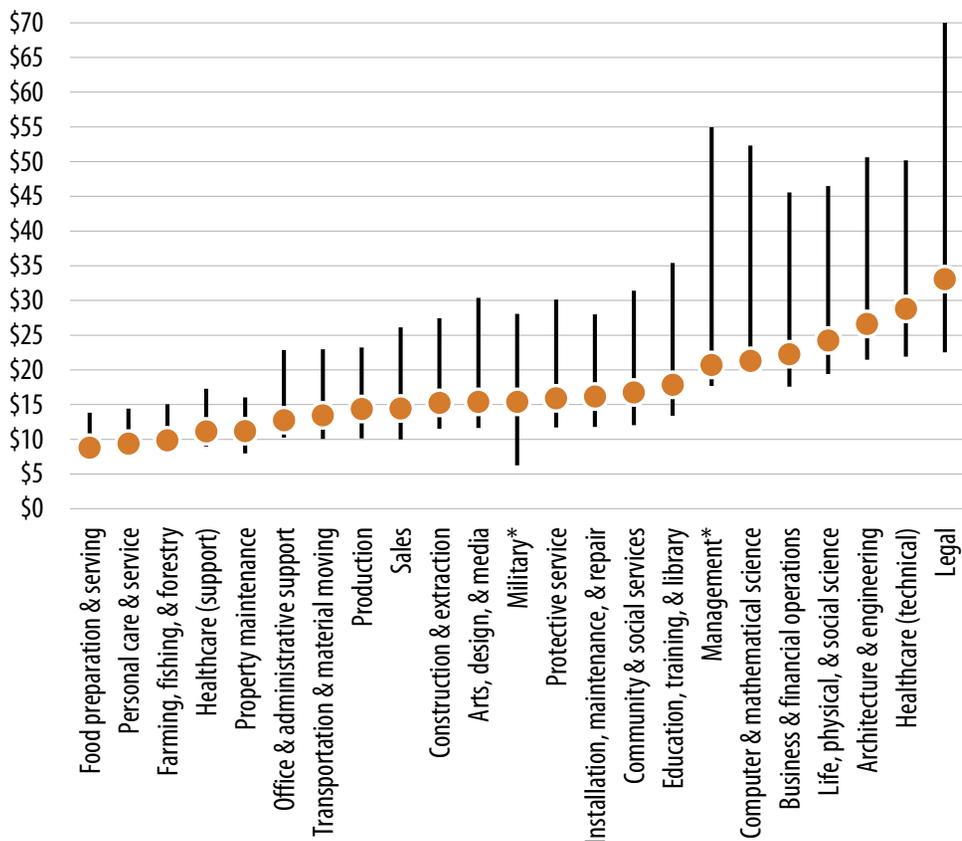
Though fewer in number, skilled workers in the Springfield MSA draw higher salaries than other occupational groups. Legal and healthcare professionals, engineers, and scientists command the county's highest median wages.

At the other end of the spectrum, support workers in food services, personal services, agriculture, healthcare support, and property maintenance earn median wages that skirt near or below \$10 per hour.

MEDIAN HOURLY WAGE RATE BY OCCUPATIONAL GROUP

Springfield MSA median wage presented in the context of the national wage range

Circle represents the MSA median; line represents the national range between the 10th and 90th percentiles



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.

Source: EMSI Complete Employment - 2012.2.

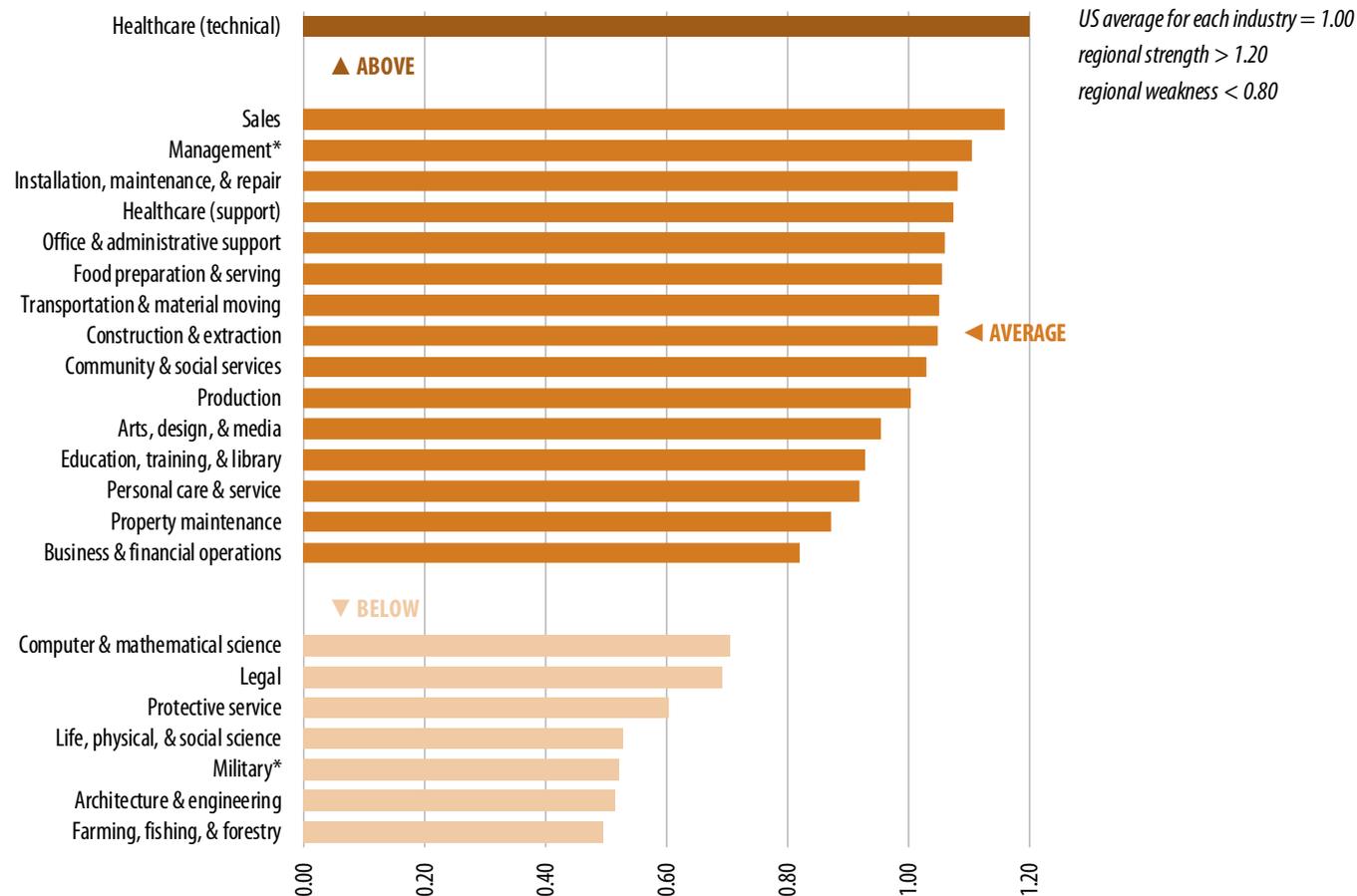
WORKFORCE

Technical professions in healthcare show the highest location quotient of any occupational group in the Springfield MSA. (Despite this high LQ, recall that Christian County contributes just 4% of the MSA's jobs in this category.)

Highly trained and well paid occupational groups such as computer technicians, engineers, and scientists are only sparsely represented within the local workforce. These are among the occupations with LQs falling below 0.80.

OCCUPATIONAL GROUP CONCENTRATIONS IN THE SPRINGFIELD MSA

Location quotient analysis



*Note: Management occupations include self-employed real estate agents and farmers & ranchers as well as construction managers and general managers; military occupations include active duty as well as reserve jobs.
 Source: EMSI Complete Employment - 2012.2.

SWOT Analysis

To better understand the region and the role it plays in the greater Springfield Area, we conducted an economic assessment. We supplemented this quantitative snapshot with public input from interviews and focus groups with key stakeholders. We then applied a strategic lens based on our knowledge of national economic development practices and trends. The result is summarized in the table to the right – Strengths, Weaknesses, Opportunities, and Threats (SWOT).

STRENGTHS	OPPORTUNITIES
<ul style="list-style-type: none"> › Location: proximity to Springfield & Branson › Accessibility: 2 airports and Interstate access– Springfield (≈20 miles), Branson (≈40 miles), I-44 (≈15 miles) › Workforce & Education: population is young, educational attainment higher than state average, competitive wages, high quality public schools, OTC campus › Economy: strength of healthcare (regionally), relative stability in terms of employment › Quality of life: low cost of living, affordable residential property values, low crime rate 	<ul style="list-style-type: none"> › Creating an organization to spearhead economic development › Better support for business located in the county › Sites to accommodate larger retail and office users – high quality / 25,000+ sf › Highly skilled medical workforce commuting to Springfield › Public-private partnerships to catalyze desirable development › Growth of OTC’s Richwood Valley Campus & “skills gap” training center › Support for entrepreneurs and accelerating development cycle
WEAKNESSES	THREATS
<ul style="list-style-type: none"> › Bedroom community: high % of residents that work in Springfield, low daytime population, retail leakage, residents’ stronger affinity toward Springfield over Nixa / Ozark › Transportation: lack of Interstate, east-west connections, Nixa’s north-south corridor, Ozark’s lack of dedicated revenue to fund transportation › Infrastructure: much of undeveloped area without services, cost of fiber high › Real estate & development: commercial vacancy high (office & industrial), impact fees high › Entertainment: few destinations to attract visitors and anchor residents 	<ul style="list-style-type: none"> › Competition from existing regional partnerships › Dependency on sales tax and development fees › Retention of high quality talent out of regional higher education institutions › Traffic and rising gas prices encouraging people to move back into Springfield › Retail competition with South Springfield › Branson’s dependency on tourism

APPENDIX B: STAKEHOLDER INPUT PARTICIPANTS

Over the course of the project, TIP solicited input from stakeholders through interviews and focus groups. In addition to the participants of the executive and leadership committee members, below is a list of other stakeholders that we met with.

Mark Alexander,
Director, Prehospital Services, COX Healthcare

Garrett Anderson,
Economic Development Director, City of Branson

James Anderson,
President, Springfield Area Chamber of Commerce

Jonas Arjes, Director of Business Development,
Taney County Business Development Partnership

Jim Atteberry,
Strategic Advisor, Health MedX

Beth Biondo,
Little Caesars Nixa & Ozark

Dustin Borland,
Missouri Gas Energy

Sean Breckenridge,
Director of Marketing, Customer Retention & Development, Bass Pro Shops

Bret Chrismer,
Sales Engineer Suddenlink

Dan Cobb,
Chief Technology Office, Health MedX

Doug Colvin,
City of Nixa Public Works Director

Charlie Daniels,
President, Health MedX

Judith Martin,
Commercial property manager

Brian Denney,
Nixa Electric Superintendant

Milton Dickensheet,
Nixa Water Quality Superintendant

Dan Dunbar,
Network and Computer Services Consultant

Steven D. Edwards,
President & CEO, COX Healthcare

Mike Fusek,
Senior Advisor, Sperry Van Ness, Rankin Company, LLC

Richard Gregg,
Commercial property owner

Jay Guffey,
Chief Operating Officer, Mercy Hospital

Hal Higdon, PhD,
Chancellor & President, Ozarks Technical College

Jeff Jochems,
Ozarks Technical College

Mary Kay Jones,
Vice President Pizza Ventures/Pendleton Company

Dr. Stephen Kleinsmith,
Superintendent, Nixa Public Schools

Stan Lippelman,
Vice President Marketing, Bass Pro Shops

Keith Rollings,
Rollings & Associates Insurance Agency

Larry Martin,
City of Ozark Public Works Director

Bob Massengale,
Heartland Realty

Caleb Matlock,
Mr. Dry Cleaners

Karen McKnight,
Nixa Public Schools

Ryan Mooney, Senior Vice President Economic Development,
Springfield Area Chamber of Commerce

Dr. Gordon Pace,
Superintendent, Ozark Public Schools

Dr. Kevin Patterson,
Assistant Superintendent, Ozark Public Schools

Brenda Rantz,
Executive Director of Finance, Nixa Public Schools

Greg Ryan,
Commercial property owner

Jeff Seifried, Manager of Regional Development,
Springfield Area Chamber of Commerce

Cody Smith,
Commerce Bank

Greg Stancer,
Commercial property owner/developer

Robert Steele, MD, Senior Vice President Market Growth & Development,
Mercy Hospital

Bethany Thomas,
Senior Vice President, Branson Chamber of Commerce

John Torgerson,
Torgerson Design Partners

Rick Warfel,
Nixa Street Superintendent

APPENDIX C: RESIDENT SURVEY

In the fall of 2012, we conducted a resident survey in Nixa and Ozark. The objective of the survey was to gain insight into the specific occupations and employers of the workers who commute out of the community each day. The surveys were sent out in utility bills. In all, 3,207 responses were collected. Of these responses, 61% live in Nixa and 38% live in Ozark.

Total Responses		
Nixa	1,944	61%
Ozark	1,208	38%
Other	55	2%
Total	3,207	100%

Of the respondents that live in Nixa and Ozark, 80% are working. The other 20% are retired, unemployed, not working, or did not answer the question. The largest employers of residents who live and work in Nixa and Ozark are the school districts followed by WalMart. However, the largest number of residents living and working in Nixa and Ozark identified themselves as self-employed.

Of those living in Nixa & Ozark:		
Working	2,530	80%
Not Working	622	20%
Total	3,152	100%

The most common occupation of the respondents living and working in Nixa and Ozark are classified as education, followed by management, and sales. Healthcare occupations were the next most common. Within healthcare, practitioners and technical were more common than healthcare support.

Of those living and working in Nixa & Ozark

Employer	No. of Residents
Self-Employed	152
Nixa Schools	68
Ozark Schools	59
Wal Mart	44
James River Assembly	11
Mercy	10
Christian County	9
City of Nixa	9
City of Ozark	8
Lowe's	7

Of those living and working in Nixa & Ozark

Occupation	No. of Residents
Education, Training, & Library	134
Management	94
Sales & Related	93
Office & Administrative Support	60
Business & Financial Operations	58
Healthcare Practitioners & Technical	46
Food Preparation & Serving Related	36
Construction & Extraction	24
Healthcare Support	24
Building & Grounds Cleaning & Maintenance	22

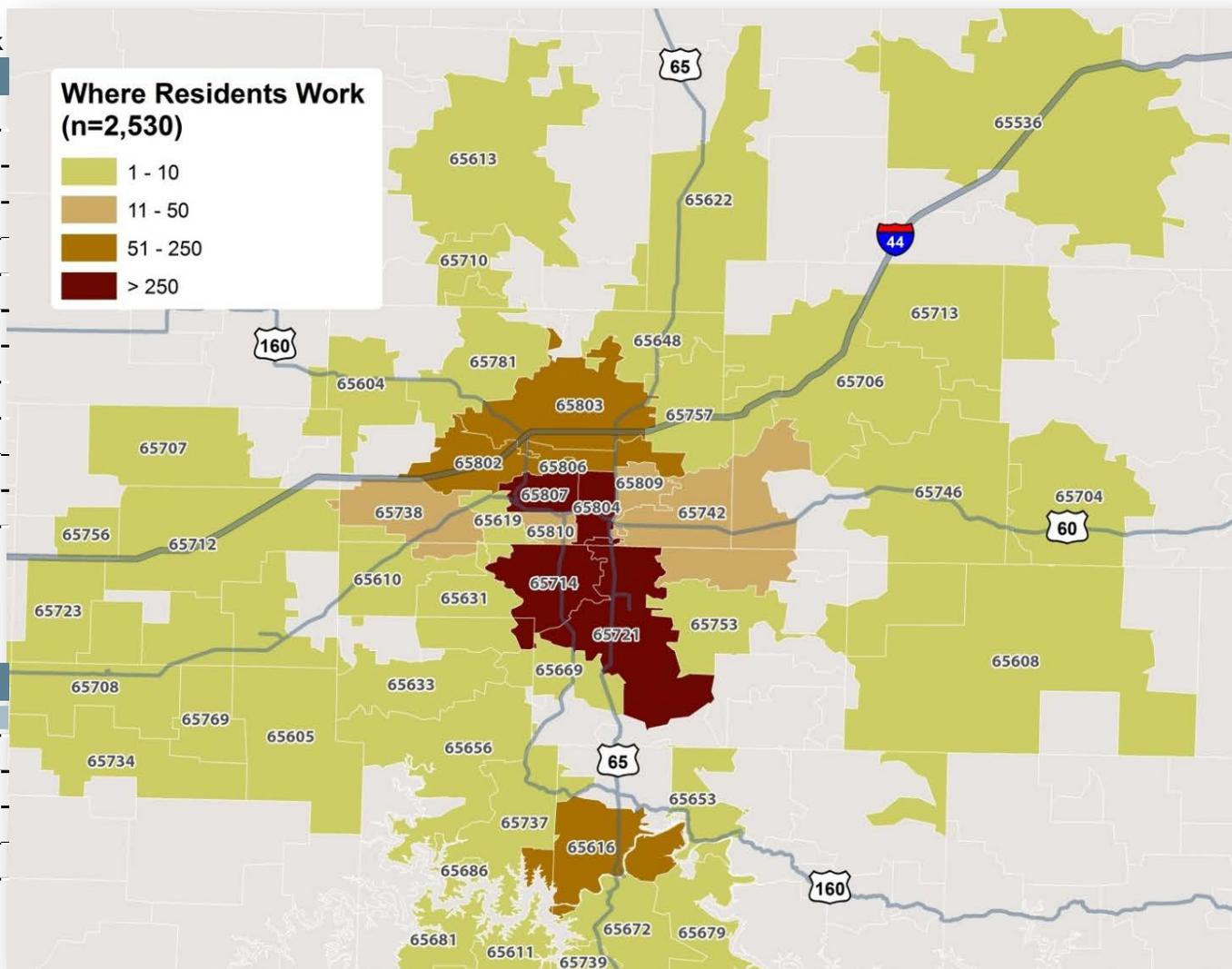
Of the respondents living in Nixa and Ozark and working (2,530), the majority commute to Springfield. Only 84 of the working residents commuted to Branson. The map below shows the geographic distribution of the working respondents. Of the self-employed, most work in Nixa or Ozark, but a number of the self-employed commute to Springfield.

Of those living in Nixa & Ozark, Where Work

Zip Code	No. of Residents
65721	444
65714	422
65804	371
65807	296
65802	229
65803	127
65616	84
65806	57
65810	50
65801	38
Other	412
Total	2,530

Self-Employed, Where Work

Zip Code	No. of Residents
65714	84
65721	68
65804	19
65802	12
65807	10



Of the 1,664 respondents that live in Nixa and Ozark but commute out of the area for work, Mercy and Cox are the top employers. Springfield Schools and Missouri State University are the next largest employers. Just over 100 respondents identify themselves as self-employed. Aside from the hospitals, O'Reilly, Bass Pro, and BKD were the largest private employers.

The most common occupation is healthcare practitioners and technical. Next, is management, followed by education, sales, administrative, and business / financial operations.

Of those living in Nixa & Ozark, but work elsewhere

Employer	No. of Residents
Mercy	119
Self-Employed	103
Cox Health	88
Springfield Schools	31
Missouri State University	26
State of Missouri	18
O'Reilly	17
Bass Pro	15
City of Springfield	15
BKD	12

Of those living in Nixa & Ozark, but work elsewhere

Occupation	No. of Residents
Healthcare Practitioners & Technical	211
Management	199
Education, Training, & Library	129
Sales & Related	128
Office & Administrative Support	126
Business & Financial Operations	125
Healthcare Support	78
Transportation & Material Moving	77
Production	49
Computer & Mathematical	46

APPENDIX D: PEER COMPARISON

As part of defining how best to organize for economic development, TIP interviewed economic development organizations in peer cities. We defined peers by identifying suburban cities in metro areas of similar size to the Springfield Metro area. Below is a summary of the peer cities and some of their characteristics.

	Nixa	Ozark	Nicholasville KY	Hendersonville NC	Benton AR
Population	19,022	17,820	28,015	13,166	30,681
Major Metro	Springfield	Springfield	Lexington	Asheville	Little Rock
MSA Population	438,094	438,094	479,244	428,906	708,085
Miles from CBD	14	17	12	26	27
School District (Ratings)	Nixa (48 of 511)	Ozark (63 of 511)	Jessamine (54 of 147)	Henderson County (39 of 176)	Benton (15 of 234)

Source: US Census Bureau, Google, SchoolDigger.com.

Of the peers interviewed, all had county-wide organizations. Two of the three were public / private partnerships. All organizations had representatives of both the private and the public sectors on their boards. The largest organization was Henderson County Partnership for Economic Development in Henderson County, North Carolina. The smallest organization was the Jessamine County Economic Development Authority. The two smaller organizations are managed by consultants who work part-time with the organizations. The Henderson County Partnership has the largest budget, largest staff, and the most complete suite of offerings.

The two of the three organizations are entirely focused on product development. In Jessamine County, the EDA actually has developed and leased out an industrial park. In Saline County, the EDC owns some sites and maintains an inventory of available sites. Henderson County does do some product development but is mostly focused on its existing business and external marketing.

All three organizations maintain positive relationships with the larger, regional chambers of commerce. In Henderson County, the partnership collaborates with the Asheville Chamber on regional product development and external marketing. In Saline County, the EDC maintains a very tight relationship with the Little Rock Chamber and the organizations have had overlapping board members.

Over-all, the Henderson County Partnership for Economic Development is most like the recommended model for the Christian County Economic Coalition, with the exception of it being a 501(c)(6). Profiles of each of the three organizations are on the following pages.

	Nicholasville KY	Hendersonville NC	Benton AR
Organization Name	Jessamine County Economic Development Authority	Henderson County Partnership for Economic Development	Saline County Economic Development Corporation
Website	http://www.nicholasville.org/economic-development.php	http://gohendersoncountync.org/	http://www.salinecountyeconomicdevelopment.com/
Organization Overview	The organization is an economic development authority that is governed by state statute. It covers the whole county, which includes the city of Nicholasville.	The organization is a public / private partnership. The county is the largest participant, 3 municipalities participate at fairly high levels, and 2 municipalities participate but not very actively. They started as part of the chamber of commerce and split completely away in 2007.	The organization is a public / private partnership that covers the whole county including 2 cities and 2 chambers. The chambers focus on retail development and the EDC focuses on everything else.
Funding	The total budget is just under \$150,000 annually. The city and county each contribute \$55,000 and they receive rental income from a property they own. They are allowed to raise private funds, but don't. Occasionally, they are awarded grant funds.	The total budget is just over \$350,000 annually. The county funds 55% of the organization. The 3 active municipalities contribute \$11,000 each.	The cities and county contribute 60 to 70% of the revenues and the private sector covers the remainder.
Governance & Structure	Governed by a 7-member board. 3 members are appointed by the city, 3 by the county, and the 7 th member is jointly appointed.	501(c)(6) that is governed by a 25 member board. There are 17 voting board members that are all private sector representatives. The 8 ex-officio members include all the mayors of the municipalities, the chair of the county commission as well as the executives of the ISD and community college.	501(c)(3) that is governed by a 21-member board. The board includes city council members from each of the cities and a representative from the county commission. The remaining board members are from across the county.
Staffing	1 consultant and a part-time assistant	3 staff members	2 consultants (retirees)

	Nicholasville KY	Hendersonville NC	Benton AR
Focus	Sites and site development. Just finishing the development of an industrial park and looking for more land to acquire and develop. They have an informal industry call program to cultivate relationships with existing businesses.	<ol style="list-style-type: none"> Existing industry Marketing to target sectors Product development Advocacy & public policy 	Sites and site development. Have a number of certified sites (through Entergy) and one Megasite. Responsive to prospects, not actively marketing.
Relationship to Regional Chamber	They have an informal relationship with Commerce Lexington, but don't pay dues or serve on the board. They are/were active with the Bluegrass Alliance, but the Alliance is largely defunct – no formal funding stream.	They sometimes partner with the Asheville Chamber for external marketing and have had conversations about regional product development, but operate independently otherwise.	Have a good relationship with Metro Little Rock Alliance, SCEDC chairman has served as chairman of MLRA
Other	Advice was to know and understand your revenue sources (from the city-perspective) and focus on what promotes fiscal sustainability (example: Mason, OH outside of Cincinnati)	Advice was to focus on product development and infrastructure, business climate, and market those aspects. Don't be afraid to market Springfield's strengths when it's to your benefit.	Feel that their biggest weakness is the lack of a dedicated tax revenue stream.

Source: TIP Strategies Research.